Textbook Tracker®

Version 4

Getting Started Guide

For Macintosh and Windows

Textbook Tracker v4.20

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Welcome to Textbook Tracker!

Textbook Tracker® Version 4

Congratulations on selecting **Textbook Tracker v4** as the textbook management tool for your school or institution. Textbook Tracker is a powerful application with facilities to help manage textbook inventory, circulation, and usage.

The *Textbook Tracker Getting Started Guide* is divided into sections that correspond to the major areas of the program. By reading this guide *in its entirety*, you will gain the insight required to run Textbook Tracker, and thus, your collection, more efficiently. You can also find this guide electronically on the installation CD or as a downloadable `.pdf` from our website: "`www.textbooktracker.com`".

So, let's begin!

The Textbook Tracker system consists of a main information server called the **Data Station**, which is the central repository for all your system information. The Data Station processes all the information and command requests from networked Textbook Tracker clients and is home to the **Data** folder, where all your crucial patron, item, and collection information (data) is saved. The Data Station can perform the same basic circulation functions (and beyond) that the **Workstations** (i.e. clients) are capable of performing.

Textbook Tracker allows for a variety of expanded modules and client programs that can access the information on your Data Station—your license determines which clients and modules you can use. Modules and clients are available for both the Macintosh and Windows operating systems, and can easily access and communicate with the same Data Station to perform specific site functions.

Textbook Tracker Modules

- **SIF** ensures that K-12 instructional and administrative software applications work together more effectively. SIF is an industry-supported blueprint that enables diverse applications to interact and share data seamlessly. SIF reduces the redundancy of data entry and allows data to be efficiently exchanged among different applications using a standard set of specifications.
- **SIP2** allows you to utilize SIP2 hardware (e.g. Checkpoint, 3M, etc.) by supporting the SIP2 protocol. Make your site more efficient with enhanced inventory and security features. Empower your patrons with self-service check-in and -out modes, allowing you more time to focus on patron information needs.
- **Advanced Bookings** provides a valuable extension to the reservation capabilities that come standard with Textbook Tracker. This useful module streamlines the management of centralized media centers that process numerous requests each day.
- **Textbook Tracker WAN** (wide area network) allows you to access collections on other Data Stations connected to your network.
- **Z39.50 Client** is a built-in server, making it easy to share your own resources with others in your district or community. In turn, patrons can access your data from community locations running Z39.50 clients.

Expanded Services

- **Textbook Tracker Patron Server** allows the entire patron record database to be stored in one central location and every Textbook Tracker and/or Textbook Tracker Data Station, once configured, can import new (or update existing) patrons as they become available.
- **Textbook Tracker Controller** allows you to house multiple Data Stations on a single, centralized server. This facilitates easy access to the server and saves travel time as well as the maintenance time required when individual information systems are stored on multiple servers.

Search Add-on Modules

- **Z39.50 Services**, including **MARC Search**, allows patrons to search numerous collections simultaneously, enhancing research, reference, and much more. You can access public schools, academic libraries, and other collections using an extremely friendly, built-in interface.

Textbook Tracker Clients

- **Textbook Tracker Workstation** is used by an operator to perform site functions such as circulation, cataloguing and all other administrative functions. Since Textbook Tracker Workstation capabilities are synched with the Data Station, many schools will choose to use the Data Station to perform these functions. You may use as many Workstation clients as your license permits—but you will always only have *one* Data Station.
- **Textbook Tracker Web Workstation** when licensed, is used to perform all the same functions as a Workstation, only using a standard *world wide web* browser such as Firefox, Safari, or Microsoft Internet Explorer.
- **Textbook Tracker Central Administrator Workstation** has all the features of a single user Textbook Tracker license plus the ability to access and modify *any* Data Station in the **District Address Book**, which, once licensed, will appear in the **System Preference Address Books** window.

The Unparalleled Power of Textbook Tracker v4!

Textbook Tracker v4 contains several advanced technologies. Although it's not necessary to understand how Textbook Tracker does what it does, this section is for the technical person who wants to know more about the inner workings of Textbook Tracker.

Textbook Tracker v4 is built on top of a proprietary cross-platform (Windows and Macintosh) development system designed specifically for Textbook Tracker. The core components of this system consist of the following unique technologies:

- A prioritized, multi-threaded scheduling system that manages all the executable components of the program. All processes within Textbook Tracker are prioritized and queued automatically by our scheduler.
- A powerful communications system that supports TCP/IP communications protocols and addressing. This system can handle thousands of simultaneous messages. All messages are encrypted for communications confidentiality. Only authorized messages are processed by the system.
- An integrated web server provides many researcher options via standard web browsers across all platforms that support web protocols.
- A powerful database engine optimized for storing and accessing collection information. Saved data is encrypted for added data security. The database is *very* high performance—on an older G4 processor with a standard disk drive, it can fully catalog up to 15-35 MARC records per second.
- A powerful, incorporated word processor that uses its own virtual memory manager to support very large documents within a small amount of physical memory. Documents can be freely moved between supported platforms.
- A class library for developing cross-platform human interfaces.
- A proprietary toolbox of code used by all subsystems.
- A fully-distributed transaction-based client/server architecture. The server (Data Station) processes requests from all clients. Only information necessary for processing is moved between clients and the Data Station. This places very low demands on overloaded wide-area networks.

Communication Ports & Protocols

There are a number of ports that are required to be open in order to successfully use Textbook Tracker:

Client machines (e.g. Workstations) contact the Textbook Tracker Data Station (sometimes referred to as the server) through **Port 30467**.

Your Textbook Tracker Data Station can update through our update server; for this we use passive FTP. You should allow your Data Station to connect to either **Port 80** or **Port 30467** in order to communicate with *updateserver.companioncorp.com* (*209.210.70.29*). You also need to allow the Data Station to connect to **Port 21** and ports greater than **1023** of our FTP server, whose address is: *69.89.29.89*.

Z39.50 searches (i.e. MARC record searches) use **Port 210**, **Port 2200** and **Port 7090**. Whatever computer is being used to catalog textbooks using a Z39.50 server needs these ports open. The Z39.50 search originates from the machine doing the search; when a record is saved, it is sent to the Data Station over **Port 30467**. The vast majority of servers use **Port 210**, some use **Port 2200**, and the Library of Congress uses **Port 7090**.

Textbook Tracker Workstations communicate with the Data Station using TCP/IP communication protocols. With Bonjour (formerly Rendezvous), clients are able to rediscover and reconnect to the Data Station on a local area network should the IP address be changed or lost. Textbook Tracker *does not* support Macintosh's **AppleTalk** protocol.

If you use clients, the Textbook Tracker Data Station should, ideally, have a fixed TCP/IP address. Although the address for the Textbook Tracker Data Station can be dynamically allocated, COMPanion recommends it be static.

> **TCP/IP** (**T**ransmission **C**ontrol **P**rotocol/**I**nternet **P**rotocol) is the protocol used for the internet and is supported as part of the basic operating systems for both Macintosh and Windows.

Where is My Textbook Tracker Data Folder Located?

Your Textbook Tracker **Data** folder is stored in your operating system's shared application support folder.

On Macintosh OSX machines, this folder is located in the following directory:

> **Hard Drive** > **Users** > **Shared** > **Library** > **Application Support** > **Textbook Tracker Support**

On a Windows XP, 2K, or 2K3 machine, the shared application folder should be kept here:

> **Hard Drive** *(typically C:)* > **Documents and Settings** > **All Users** > **Documents** > **Textbook Tracker Support**

On a Windows Vista machine, the shared application folder should be kept here:

> **Hard Drive** *(typically C:)* > **ProgramData** > **Textbook Tracker Support**

Note and Warning Alerts

- NOTE-

Look for a box like this for special notes or comments that should be carefully examined by the user!

¡ WARNING!

Look for a box like this for warning messages or important comments that should not be ignored!

Preparing for Textbook Tracker

This section provides an overview on how to prepare for the automation of your collection.

When following the steps provided in this *Getting Started Guide*, it is best to have Textbook Tracker open and active in order to fully understand the program as you follow along.

Automating Your Collection Overview

Use the following steps (and referenced pages) to prepare your collection for automation with Textbook Tracker:

Step 1. Develop strategies for both secure backup and item/patron importation; *see page 6*.

Step 2. Barcode your collection; *see page 10*.

Step 3. Install Textbook Tracker; *see page 15*.

Step 4. Set **Scheduled Events** (**Archive** & **Rebuild**); *see page 51*.

Step 5. Set what COMPanion considers to be your essential **System Preferences**; *see pages 47 through 119*.

Step 6. Add your item and patron information; *see page 129*.

Step 7. Develop an Textbook Tracker/machine maintenance strategy; *see page 14*.

Step 8. Evaluate the security of your Data Station; *see page 14*.

NOTE:
Textbook Tracker's **Archive Utilities** *do not* substitute for a proper backup!

Develop a Secure Backup Strategy

Backups are duplicated computer files that should be saved to an external source. You should have a backup strategy in place to ensure that you always have a current backup of your Textbook Tracker data files.

Daily backups of your Textbook Tracker data are highly recommended!

- NOTE -
Backing up your data isn't necessary for hosted customers and is, therefore, not an option.

Backing Up Your Data; What to Backup

Your data files change every time you use the Textbook Tracker system. For example, each time you update an item or patron record, check an item in or out, or perform any other transaction in Textbook Tracker, the data files are modified to reflect your changes.

All Textbook Tracker information is stored in the **Data** folder *(see page 6 to find out where your **Data** folder is located);* this makes it easy to backup your data on a regular basis.

For the purpose of backups, there are two kinds of files.

- **Program Files** are the files that make your applications run. These files are sent to you on CD or are downloaded from the internet and you install them. In the case of hardware failure, you can reinstall these program files. For this reason, you are allowed to make *one* backup copy of the original CDs to archive before storing both the original and backup copy in a safe place.
- **Data Files** are where your system information is stored. When you input and change information using Textbook Tracker, your data files are updated. Because these files can change every time you use the application, and because losing all the data you have manually entered can be a major loss, you must make backup copies of your data on a regular basis.

Why You Must Backup Your Data

If you think disaster can't happen to you, think again! Although modern-day computers are generally reliable, they are still as fallible as those who created them. Inevitably, at some point during the life of your computer, you will suffer a hardware malfunction that will cause data loss within Textbook Tracker.

Sadly, more often than not, human error is to blame for data loss; an operator makes large, incorrect changes to your data, or, in a moment of distraction, data is accidentally deleted. Although you can always replace broken computer components and reinstall the Textbook Tracker application, doing so will *not* retrieve lost data files.

Your only options for recovering lost data when you have suffered from hardware malfunction or human error are to either re-enter your data by hand or to recover it from your most recent backup copy—and then update only the data that had changed since the last backup was made. The more current the backup of your data, the less data you will have to re-enter.

Far too frequently we get contacted by customers hoping we've somehow stored a copy of their pre-crash data so that they won't have to start from scratch. Some of these customers had backups, but they turned out to be damaged, or, when attempting to recover their backup, they accidentally erased it!

Because of these occurrences, it's very important for administrators to ensure that they have a backup strategy in place so their library data is secure and that they always have a current backup of their most recent Textbook Tracker data files. With adequate backup procedures in place, only small amounts of information will ever be lost, even after the worst conceivable failure.

Your backup procedure for Textbook Tracker should copy the entirety of the **Data** folder. Some automation systems only backup your transactions on a daily basis. Although this technique results in a fast backup, it's not complete, and recovery can take much longer than a full backup.

If you make a backup copy of the **Data** folder at the end of each day, you'll be able to recover all the changes you've made through the end of that day; you can then recover the data quickly and easily, should it be required.

Although Textbook Tracker has a built-in **Archive** function that saves a copy of your data in an **Archive** folder, this is only useful unless the hard disk where the data is stored is damaged. Therefore, we suggest frequent data backup, and taking copies of your data to a safe site away from your library.

Over the past few years, new and inexpensive "cloud storage" services have made off-site backup easier and, in many cases, cheaper. One such service is called **Dropbox** (`www.dropbox.com`) where an initial 2GB account for backup is free, with other paid options available at very reasonable prices.

Whatever you put into your **Dropbox** folder is automatically saved onto their remote servers and can be recovered quickly in case of disaster. **Dropbox** isn't just used for backup, however, it's also a great tool for collaboration as saved files can be synced with other machines—even between Macintosh and Windows. Better yet, **Dropbox** keeps copies of your data for up to a month. If you have modest needs, **Dropbox** is simple and free.

Another service is **CrashPlan** (`www.crashplan.com`), a great general purpose tool specifically designed for backup to other machines, or off-site to the **CrashPlan** servers. In fact, COMPanion uses **CrashPlan** to backup all of the machines at our corporate offices. For more advanced backups, **CrashPlan** can help you protect your valuable library data.

There are many other cloud storage services available, each with their own unique benefits. However, the service you use isn't as important as performing frequent and secure backups of your valuable data. If you don't already have a backup strategy in place, start one today!

NOTE:
Daily backups of your Textbook Tracker data are *highly* recommended!

Determining a Backup Strategy

A backup strategy is a schedule for performing backups at regular intervals. It is *highly recommended* that you use the following guidelines in your backup strategy.

- Before using a new service, perform an initial backup to create a permanent archive of your data.
- **Create a schedule to backup your Data folder at the end of each day.**
- Make additional backups before and after you make any major changes to your system. For example, after you perform an inventory and use **Utilities** to update your records at year-end, you should backup your data.
- To minimize data loss due to faulty backup devices (such as a portable hard drive) avoid using the same USB Flash, portable hard drive, or CD/DVD-RW for consecutive backups.
- Make more than one backup copy of data and keep copies off-location. This protects your data in case of fire or theft in the library. Some institutions will choose to take backup copies off-location each week; others daily, and others monthly. Remember, the more recent the backup, the less information that will need to be re-entered.
- Test your backup strategy and recovery procedures to make sure they work and that you know how to recover data. Do this *before* you have a problem so you'll know that you can recover data in an emergency.

Backup Hardware

Although you can use any computer mass storage device for backups, the most reliable and cost-effective choice is cloud storage[1] (e.g. **Dropbox**, **CrashPlan**, **Mozy**, etc.) and removable media (USB Flash, CD/DVD-R, CD/DVD-RW, etc.). COMPanion recommends that you **DO NOT** backup on any hard disks connected to your computer. For reliability's sake, backup media should be stored away from your computer in case of theft, fire or other physical loss.

If you have a large amount of data, cloud storage backup is the most reliable, cost-effective and efficient method. With cloud storage, you can set backup procedures to run at a predetermined day and time without operator interaction. Currently, most cloud storage services allow you to upload several gigabytes of data for free when you create an account. If you have smaller amounts of data, removable media devices, such as external hard drives, provide ease of use and security.

Your choice of backup hardware will depend on your budget, the amount of data you need to backup, and the policies and procedures within your district or library.

1.Cloud storage is a model of networked computer data storage where data is stored on multiple virtual servers, generally hosted by third parties, rather than being hosted on dedicated servers. Hosting companies operate large data centers; and people who require their data to be hosted buy or lease storage capacity from them and use it for their storage needs. The data center operators, in the background, virtualize the resources according to the requirements of the customer and expose them as virtual servers, which the customers can themselves manage. Physically, the resource may span across multiple servers.

Sample Backup Strategy

An increasing number of online cloud storage services offer low-cost backups. This strategy requires installing a piece of software (i.e. a "client") on your computer and then backing up your data to their internet servers, generally referred to as the "cloud". Leading contenders include **Dropbox**, **CrashPlan**, **Carbonite**, and **Mozy**.

The following is a sample strategy for using routine cloud storage backup during normal operations:

Step 1. First, choose a cloud storage service. There are many factors to consider, including the service level agreement, speed, cost, etc.

Step 2. Next, install the cloud storage client software of your choice.

Step 3. During setup, select the files and/or folders you want to back up immediately; for example, the *entirety* of Textbook Tracker's **Data** folder.

Step 4. Be sure to set up automatic backups to run at times of the day when your network isn't being flooded with other traffic (e.g. `4:00am`). This guarantees faster upload and reduces the possibility of failure due to network traffic.

Step 5. Some services allow you to add specific days (e.g. next `Friday`) or perform manual backups of files and folders; this usually works in tandem with the automatic backup schedule you configured in the step above and comes in handy before performing an inventory or using **Utilities** to update your records at year-end—things that generally make large, sweeping changes to your library data.

Step 6. Most cloud storage services will usually flag files that have already been backed up. Therefore, if files have not changed in any way, they will not be backed up again after the initial backup is complete. This speeds up the process remarkably as only new files are backed up each time and duplicate files are not.

Step 7. As with any backup strategy, you must also think about how to restore lost data. Most cloud services allow you to select an individual file for immediate download, download an archived bundle of all your files, or have your files sent via removable media (e.g. CD/DVD-ROM). Whatever you choose, be sure to test recovery procedures before you have a problem so you'll know how to recover your data in case of an emergency.

Saving to the cloud helps to store your files in a location other than the library, which guards against loss of data in case of fire or theft.

Barcode Your Collection

Each item and patron in your school is assigned a unique number that Textbook Tracker uses for identification. These numbers appear as barcode numbers on items and patron identification cards.

A typical barcode label consists of three pieces of information:

- The name of the site, school, or company
- The barcode, usually printed in the middle of the label
- The barcode number written in numerals at the bottom of the label

A barcode can be read quickly by powerful, low-cost scanning devices that you can purchase from COMPanion. Using a barcode reader makes your job easier and reduces the chance for errors. If you don't have a scanner, you can type the user-readable number in the command line.

The format of the barcode is called its *symbology*. The symbology COMPanion uses, Code 39 (also known as Code 3 of 9), is the industry standard for industrial and commercial applications—including schools and libraries. This symbology provides a high level of data security with error rates between 1 in 3 million and 1 in 70 million characters scanned. Code 39 does not require a check character in normal commercial and industrial applications. It is also bi-directional, which means it can be scanned from left to right or from right to left.

You will need barcode labels on all of the items in your collection that are to be managed with Textbook Tracker. You may also want to barcode objects such as audio-visual equipment, computers, desks, and tables, so you can use Textbook Tracker to inventory these items.

You can also keep temporary item records such as magazines and newspapers. Temporary items can be assigned a barcode number and then circulated like permanent items. A barcode number is assigned to a temporary item only while it's checked out.

Guidelines for Choosing Barcode Numbers

You can set up barcode numbers (according to your needs) using up to fifteen digits. The following are general guidelines for determining your barcode numbering:

- Use the same number of digits for items and patrons.
- Consider using an employee ID or student number for patron barcodes (be sure employee IDs or student numbers do not coincide with item numbers).
- If you have more than one collection in your system, use a unique barcode numbering scheme for each collection. This will make it easier to manage a central catalog with holdings from all sites within the system. If items are moved between collections, the barcodes will remain unique and do not interfere with existing item barcodes.

- Use the simplest numbering scheme possible that still meets your needs.

Sample Barcode Numbering Scheme

The following is a sample barcode numbering scheme. This scheme supports management of up to 899 sites with each site having up to 300,000 patrons and 700,000 items. You can vary this scheme to handle more sites, groups within a site, or independent items.

> **- NOTE -**
>
> It is recommended that you avoid starting barcodes with zero ("0") as the first digit. Barcodes can contain letters and numbers; spaces and punctuation are *not* allowed.

This sample scheme uses a 9-digit barcode number for items and patrons.

- **Digits 1 to 3** identify the site. For example, 100 is Eastside School, 200 is Westside School, and so forth.

  You can use the three digits within this group to further breakdown the sites. For example:

  110 — Eastside Elementary School
  130 — Eastside Middle School
  150 — Eastside High School
  210 — Westside Elementary School
  230 — Westside Middle School
  ...and so on

  If you have more than one site in your system, using unique barcodes for each site's collection makes it easier to manage a central catalog with holdings from all sites in the district. All barcodes are unique and do not interfere with barcodes for existing items.

- **Digit 4** can tie a barcode to a patron group such as students or staff, to a medium type or vendor, or to an item group such as fiction or reference. For example, if you use 0 through 2 for patrons and 3 through 9 for items, you will have unique barcode numbers for 3 patron groups and 7 item groups.

- **Digits 5 through 9** identify the individual patrons or items in the group.

Using the above scheme, you would have barcodes similar to the following. The bold digits identify the site, the underlined digit identifies the patron or item group, and the remaining digits identify the particular patron or item.

110 2 00361 **110** identifies the site

2 identifies the patron or item group

00361 is the specific patron or item's number

If you have a smaller number of patrons, you can choose a simpler code with fewer digits. The main objective is to keep the number of digits the same for items and patrons to ensure that each site in a district has a unique range of barcode numbers and to use the most straightforward numbering scheme as possible, while still meeting your needs.

NOTE:
The spaces between numbers in the barcode example to the right are for readability.

The actual barcode would be entered as:
110200361

Classes of Barcode Labels

There are two classes of barcode label.

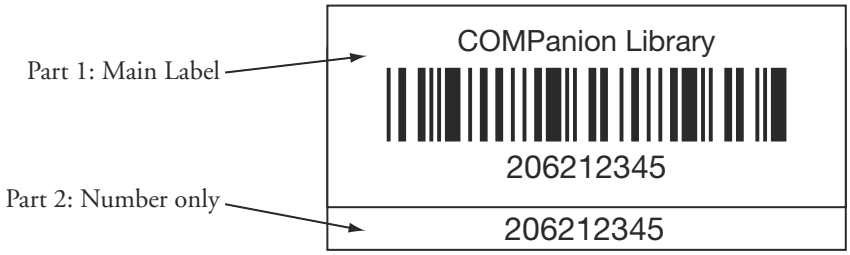
- **Photocomposed labels** are made using a photographic process to create high-quality, long-lasting labels. Rather than printing ink on paper, the photocomposed process makes the barcode image an integral part of the label. These labels usually come with high-quality lamination and adhesives that make them durable and easy to attach. You should use photocomposed labels on all permanent items.
- **Printed labels** are made using a printing process that places the ink on top of the label. These labels require protection of some kind to keep the ink from rubbing off. An extra protection label of transparent Mylar can be placed on these to extend their lives. Although the cost of these labels is less than photocomposed labels, the protection and labor they require can cause them, in some cases, to cost more. Printed labels without extra protection are most cost-effective when printed by you in your school and used for temporary items such as magazines and newspapers.

One and Two-Part Labels

You can purchase either one or two-part barcode labels, depending on how you plan to use them. One-part labels include the site name, barcode, and written number.

If you want to place a barcode label in two different locations on an item, you can order two copies of these one-part labels.

Two-part labels include the same information as the one-part label. The two-part labels also include a second portion on the label, which display the written barcode number.



The second part of the label is useful to attach to a shelf list card or to place on the book in a different location than the upper portion.

Two-part labels provide the benefit of having two labels for each item, at a lower overall cost.

Where to Place Barcode Labels

You can place barcode labels on the inside or outside of items. A label on the outside is easy to locate, but is subject to much greater wear and tear, therefore shortening its lifespan.

Most Textbook Tracker users place their labels on the inside back cover of books and on the outside of items such as records, tapes and CDs.

If you plan to place barcode labels under a transparent jacket cover, test your barcode reader to make sure it can read the labels through the jacket cover.

Placing barcodes vertically on the back cover next to the spine can make inventory easier since you wouldn't need to fully remove the books from the shelf to scan them with a barcode reader.

When to Label Items

You can label items either before or after you enter your item information.

For an existing collection, it's usually easier to purchase your barcode labels early and place them on items before the item information is entered into the computer. Use two-part labels for this method. As you place the barcode on the item, place the second label on the shelf list card that will be used for entering item data into the computer.

If you are starting a new collection, be sure to purchase bibliographic information for your items in a computer-readable format (MARC or MicroLIF). Either order your books with barcode labels attached, or tell your supplier which numbers to assign (in the MARC/MicroLIF records). Have the numbers assigned in call number order so it's easy for you to locate the item for each barcode label you have to apply.

Barcode Readers

Your computer requires a special device designed to read a barcode number and enter the corresponding value into the computer. This device is called a *barcode reader* or *scanner*.

There are a number of different types of barcode readers available, including light-pen readers, laser readers and portable readers. The device you choose depends on your budget and the school's requirements.

Wand or pen-type readers are the least expensive devices for reading barcodes. CCD wedge or laser scanners are more expensive but do a better job reading the labels (especially in those hard-to-reach item places).

Portable readers give you the freedom of going to your bookshelves to scan labels, rather than having to take the books to the computer to be scanned. Portable readers are especially useful during inventory.

Develop Maintenance Strategies

a) Develop a Machine Maintenance Strategy

Although computers today are very useful tools, they can experience damage through excessive use, power fluctuations, crashes, and incorrect operations. To discover or postpone such damage, you should run maintenance utilities such as **Scandisk** or **Disk Defragment** on Windows and **Norton Disk Doctor** on Macintosh. Textbook Tracker *should not* be running during *any* machine maintenance operations.

In addition, you should regularly perform a virus scan with products such as **Norton Anti-Virus** or **McAfee Virus-Scan**. Again, Textbook Tracker should *not* be running when performing such virus scans.

b) Develop an Textbook Tracker Maintenance Strategy

Corruption can happen to any database of information via hardware or operating system error. It is recommended that you use Textbook Tracker's **Rebuild Utilities** on a regular basis—once a month is usually sufficient for a single Data Station, twice a month for multiple Data Stations housed within the Textbook Tracker Controller, and once a week for Central Union users.

However, hardware or system failure may necessitate using this utility more often. The **Rebuild** disables all services while it is cleaning your data and can take several hours depending on the size of your data and speed of your machine. You should backup or archive prior to running a **Rebuild**, just as you should with any other utility.

Evaluate the Security of Your Data Station

Some schools may not have the funds or hardware necessary to have both a dedicated Data Station and accessible clients. If your Data Station is accessible to the general public, you may want to enable additional security that would prevent unauthorized users from deleting, renaming, or moving your Textbook Tracker application or **Data** folder. Some file security may be built into your operating system; some operating systems have no such security and would require purchasing third party software to provide that file security.

If you don't have file security on your Data Station, you should be extra vigilant in backing up your **Data** folder.

Installing Textbook Tracker

This section will teach you how to install the Textbook Tracker Data Station and other standard Textbook Tracker clients. The instructions in this section assume that you have a basic working knowledge of your computer's operating system.

Before you install Textbook Tracker, make sure that you have the registration letter that came with your program—it contains essential information that is required during the installation process.

Hardware and Operating System Recommendations

Textbook Tracker has been developed to work under both Windows and Macintosh-based operating systems. With the exception of subtle differences between the controls at the tops of windows and minor differences in operating system functionality, the program operates identically across both platforms.

Here are the minimal recommended hardware and operating system requirements for Textbook Tracker:

Textbook Tracker Hardware & System Requirements

	Minimum	Recommended
Textbook Tracker®: Data Stations	Mac OS 10.5+ Windows XP+ G4, Pentium 4 (or equivalent) 1 GB of RAM (or higher) 20 GB of Free HD/100,000 Items 1024 x 768 Screen Resolution	Mac OS 10.6+ Windows XP or 2003+ X86 Multi-Core/Processor 2 GB of RAM (or higher)
Textbook Tracker®: Central Union Data Stations	Mac OS 10.5, Windows XP+ G5 or X86, Dual Processor/Core 2 GB of RAM 20 GB of Free HD/100,000 Items 1024 x 768 Screen Resolution TCP/IP Network	Mac OS 10.6+ Windows 2003 X86 Multi-Core/Processor 4 GB of RAM (or higher)
Textbook Tracker®: Controller	Mac OS 10.5 Windows XP+ G5 or X86, Dual Processor/Core 2 GB of RAM 20 GB of Free HD/100,000 Items 1024 x 768 Screen Resolution TCP/IP Network	Mac OS 10.6+ Windows 2003 X86 Multi-Core/Processor 4 GB of RAM (or higher)
Textbook Tracker®: Workstations	Mac OS 10.5+ Windows XP+ G4, Pentium 4+ (or equivalent) 256 MB of RAM 200 MB of Free HD 1024 x 768 Screen Resolution TCP/IP Network	Mac OS 10.6+ Windows XP or Vista 512 MB of RAM (or higher)

Installation Summary *(read this first)*

If one doesn't already exist, the installer will create an **Textbook Tracker** folder and extract the Textbook Tracker program there. All of your collection information (data) will be stored in an **Textbook Tracker Support** folder located in the system shared application directory. Once installed, the Textbook Tracker Data Station will facilitate the installation of other clients.

The Data Station can perform the same basic circulation functions (and beyond) that the Workstations (i.e. clients) are capable of performing. Your Data Station *does not* count as a client unless you have purchased a "single user" license; this license doesn't allow any other clients.

If you only have a couple of computers, you may want your main circulation machine to also be your Data Station. In this case, you wouldn't typically install another Workstation. Your Data Station will be used by the Workstation for circulation and reporting.

In a middle-sized configuration, you may have a machine in the "back room" or "server closet" that is only used for infrequent operator maintenance. Install the Data Station on this machine and your Textbook Tracker Workstations on other machines.

If you are planning to have a large number of clients, you'll want to install your Data Station on a dedicated machine (i.e. a machine that will *only* run the Data Station and will not typically be used by an operator). In this configuration, you'll be running Workstations on other machines.

Detailed below are the general steps required to install Textbook Tracker. Individualized instructions (depending on your operating system) can be found throughout the remaining pages of this section.

Step 1. On the machine you are going to use for your Data Station, visit COMPanion's website (`www.textbooktracker.com`) and download the latest **Textbook Tracker Installer**. You can also insert the Textbook Tracker CD-ROM and double-click on the **Textbook Tracker folder**. The **Textbook Tracker Installer** is located inside this folder.

Step 2. Once Textbook Tracker has been installed, double-click on the **Textbook Tracker** program icon. Enter your registration information. If your system doesn't have the necessary resources to allow for client installation, Textbook Tracker will attempt to download them from COMPanion's update server. In this case, installations may not be possible until the next time you launch Textbook Tracker.

Step 3. To install an Textbook Tracker Workstation client over the web, you'll need to open an internet browser on the machine where you wish to install the client. In the address bar of the browser window, type in the IP address of your main **Textbook Tracker Data Station** followed by "`/install`" (Windows or Macintosh OSX). Follow the instructions that appear on the web page to install your clients.

Step 4. If you've licensed use of **Web Workstation**, your registration code will activate it—all you need to do is set your **Site Information** preferences.

Step 5. If you've licensed use of **Textbook Tracker WAN** and/or **Z39.50** capabilities, your registration code will activate it—all you need to do is set up your **Address Books** in the **Administration** preferences.

Installing Textbook Tracker for Macintosh

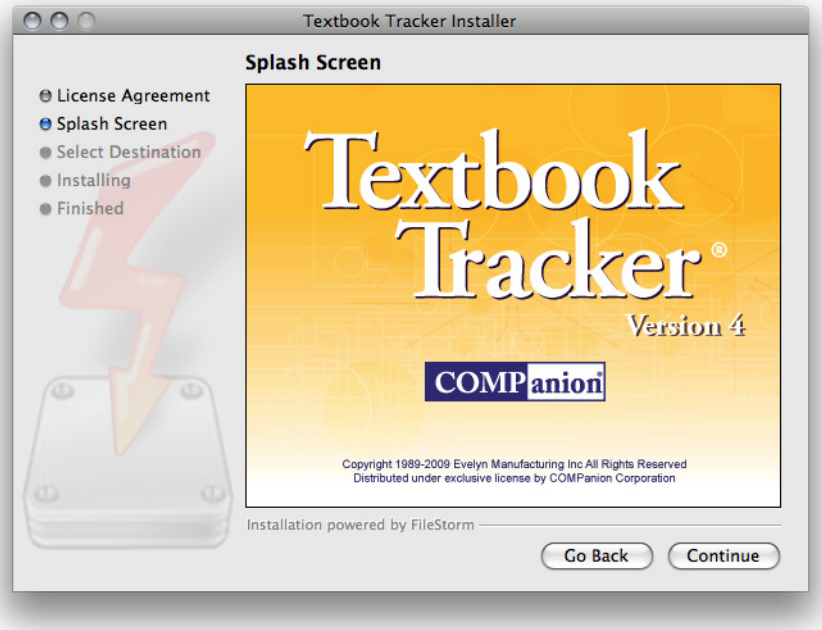
If you are installing **Textbook Tracker** or an **Textbook Tracker Central Administrator Workstation** on a Macintosh OSX machine for the very first time, please use these easy-to-follow steps. If you are installing the **Textbook Tracker Central Administrator Workstation**, follow these directions using the **Central Administrator Workstation Installer.dmg** instead.

If you have questions or problems during installation, contact COMPanion's Technical Support Service at (800) 347-4942 or (801) 943-7277, by fax at (801) 943-7752, by toll-free fax at (888) 515-3883, or by email via: `support@companioncorp.com`.

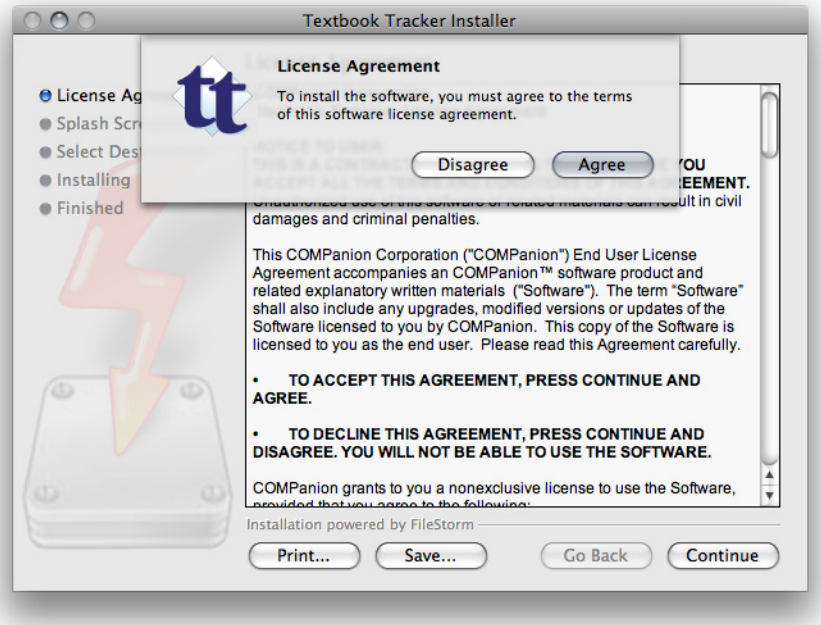
Step 1. Insert the COMPanion CD and double-click on the **Textbook Tracker v4** folder. The installers for your operating system will be located inside this folder. You can also visit COMPanion's web site and download the latest Textbook Tracker installer (`www.textbooktracker.com`). Remember, the first machine that you install **Textbook Tracker** on will be used as your Data Station.

Step 2. Double-click on the file called **Textbook Tracker Installer.dmg**. Doing so will mount the **Textbook Tracker Install** icon on your desktop.

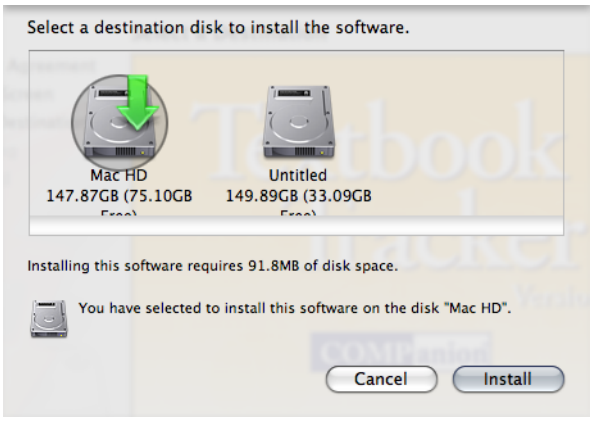
Step 3. Double-click on the **Textbook Tracker Installer** icon located inside this window. When the installers **Textbook Tracker Setup** window appears, click on **Continue**.



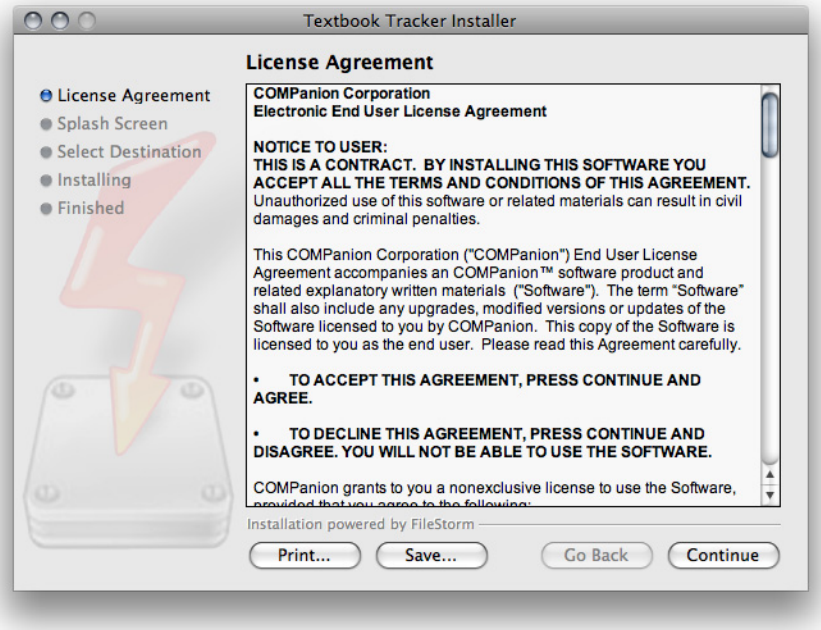
Step 4. Next, the COMPanion Corporation Electronic End User License Agreement appears. Read the license carefully and once you have finished, click on **Continue**. A **License Agreement** drop-down menu will appear. Click on the **Agree** button if you accept the terms of the license. If you do not accept the terms of the license, click the **Disagree** button.


Textbook Tracker Installer
License Agreement
To install the software, you must agree to the terms of this software license agreement.
Disagree
Agree
damages and criminal penalties.
This COMPanion Corporation ("COMPanion") End User License Agreement accompanies an COMPanion™ software product and related explanatory written materials ("Software"). The term "Software" shall also include any upgrades, modified versions or updates of the Software licensed to you by COMPanion. This copy of the Software is licensed to you as the end user. Please read this Agreement carefully.
• TO ACCEPT THIS AGREEMENT, PRESS CONTINUE AND AGREE.
• TO DECLINE THIS AGREEMENT, PRESS CONTINUE AND DISAGREE. YOU WILL NOT BE ABLE TO USE THE SOFTWARE.
COMPanion grants to you a nonexclusive license to use the Software,
Installation powered by FileStorm
Print...
Save...
Go Back
Continue

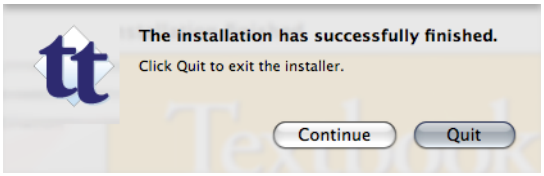
Step 5. When the following window appears, verify the destination disk where you'd like Textbook Tracker installed. The default is the hard drive where the currently active System Folder is located. Unless special circumstances apply, this is usually the best location to install Textbook Tracker. Select the icon of the hard drive so that a green arrow appears above it. Click **Install**.


Select a destination disk to install the software.
Mac HD
147.87GB (75.10GB
Untitled
149.89GB (33.09GB
Installing this software requires 91.8MB of disk space.
You have selected to install this software on the disk "Mac HD".
Cancel
Install

Step 6. During installation, the **License Agreement** window will reappear, showing you the installation's progress.


Textbook Tracker Installer
License Agreement
License Agreement
Splash Screen
Select Destination
Installing
Finished
COMPanion Corporation
Electronic End User License Agreement
NOTICE TO USER:
THIS IS A CONTRACT. BY INSTALLING THIS SOFTWARE YOU ACCEPT ALL THE TERMS AND CONDITIONS OF THIS AGREEMENT.
Unauthorized use of this software or related materials can result in civil damages and criminal penalties.
This COMPanion Corporation ("COMPanion") End User License Agreement accompanies an COMPanion™ software product and related explanatory written materials ("Software"). The term "Software" shall also include any upgrades, modified versions or updates of the Software licensed to you by COMPanion. This copy of the Software is licensed to you as the end user. Please read this Agreement carefully.
• TO ACCEPT THIS AGREEMENT, PRESS CONTINUE AND AGREE.
• TO DECLINE THIS AGREEMENT, PRESS CONTINUE AND DISAGREE. YOU WILL NOT BE ABLE TO USE THE SOFTWARE.
COMPanion grants to you a nonexclusive license to use the Software,
Installation powered by FileStorm
Print...
Save...
Go Back
Continue

Step 7. When the installation is complete, a confirmation window will appear. Click **Quit**.



Step 8. If you installed using a CD-ROM, eject the CD by dragging its icon to the **Trash Can** located on the desktop or the **Eject** icon in your OSX Dock. Store the CD-ROM in a safe place for future use

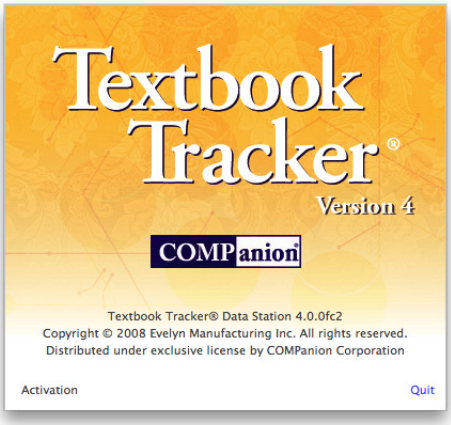
Step 9. Note: This *Getting Started Guide* is included on the Textbook Tracker CD-ROM (in ".pdf" format) but is not installed with the application. You can double-click on the documentation icon on the CD-ROM to open it directly or you can copy it to your hard drive and open it there.

If you don't have **Adobe's Acrobat Reader** installed on your machine, an installer is included in the **Utilities** folder of your COMPanion CD-ROM or from Adobe's web site: `http://www.adobe.com/`

Step 10. Locate the newly installed **Textbook Tracker v4** folder on your hard drive. If you see fit, you may now move the **Textbook Tracker v4** folder to an alternate location on your hard drive. Inside the folder, double-click the **Textbook Tracker** icon to start the program.

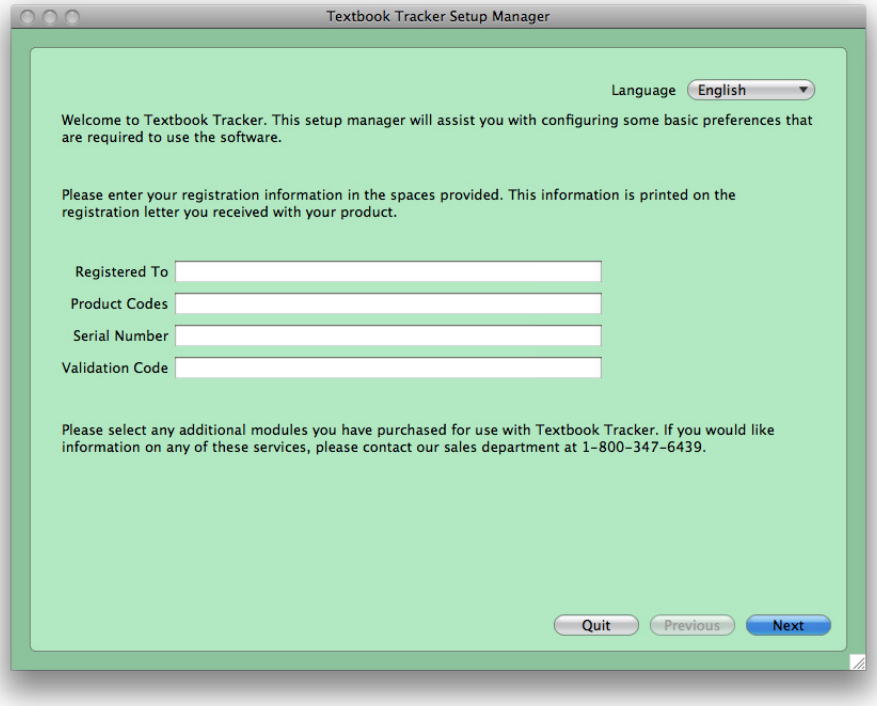
¡ WARNING!
If you have PPP installed, but not running, the Textbook Tracker Data Station may try to connect through PPP. If the connection window appears, click **Stop** to keep the Data Station from connecting through PPP.

Step 11. When you start Textbook Tracker, the following window appears. If you have not yet registered Textbook Tracker, the **Setup Manager** window appears (described in Step 12).



Otherwise, the **Circulation** window will appear.

Step 12. The first time you start the Data Station, the **Setup Manager** window will appear. Enter your **Registered To** name, **Product Codes**, **Serial Number** and **Validation Code** from your registration letter and click **OK** to continue through the **Setup Manager**.


Textbook Tracker Setup Manager
Language English
Welcome to Textbook Tracker. This setup manager will assist you with configuring some basic preferences that are required to use the software.
Please enter your registration information in the spaces provided. This information is printed on the registration letter you received with your product.
Registered To
Product Codes
Serial Number
Validation Code
Please select any additional modules you have purchased for use with Textbook Tracker. If you would like information on any of these services, please contact our sales department at 1-800-347-6439.
Quit
Previous
Next

Step 13. That's it! You've installed your Textbook Tracker Data Station. If you've purchased a single-user license, you're finished installing. If you've licensed additional clients, see "Installing Textbook Tracker Clients" on page 28.

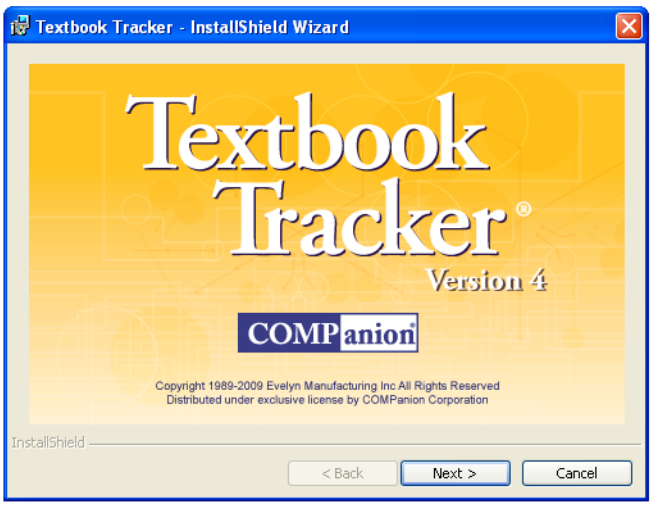
Installing Textbook Tracker for Windows

Use the following instructions to install **Textbook Tracker** or **Textbook Tracker Central Administrator Workstation** on Windows. If you are installing the **Textbook Tracker Central Administrator Workstation**, follow these directions using the **Central Administrator Workstation Installer.exe** instead.

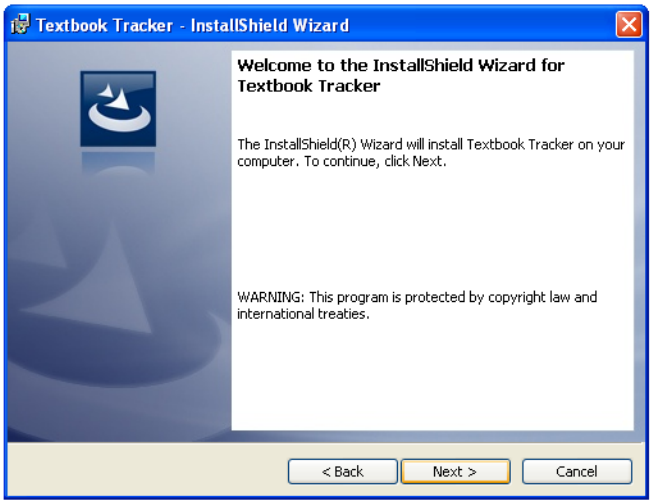
If you have questions or problems during installation, contact COMPanion's Technical Support Service at (800) 347-4942 or (801) 943-7277, by fax at (801) 943-7752, by toll-free fax at (888) 515-3883, or by email via: `support@companioncorp.com`.

Step 1. On the machine you are going to use for your Data Station, insert the COMPanion CD-ROM. If it doesn't auto-start, you may locate it using the **My Computer** icon on your Desktop. Double-click the CD icon and then double-click on the **Textbook Tracker** folder. The Textbook Tracker installer (**Textbook Tracker Installer.exe**) is located inside this folder. You may also go to COMPanion's website (`www.companioncorp.com`) and download the latest Textbook Tracker Installer.

Step 2. Double-click the **Textbook Tracker Installer.exe** icon. When the **Textbook Tracker Setup** splash screen appears, click **Next** to continue.



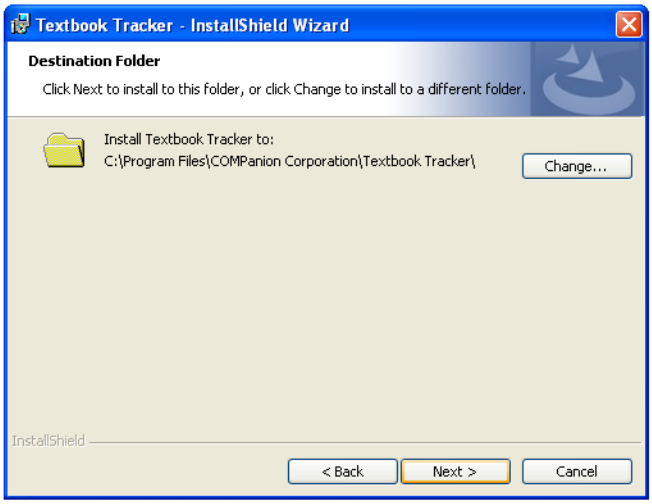
Step 3. On the **Welcome** window, click **Next** to continue.


Textbook Tracker - InstallShield Wizard
Welcome to the InstallShield Wizard for Textbook Tracker
The InstallShield(R) Wizard will install Textbook Tracker on your computer. To continue, click Next.
WARNING: This program is protected by copyright law and international treaties.
< Back
Next >
Cancel

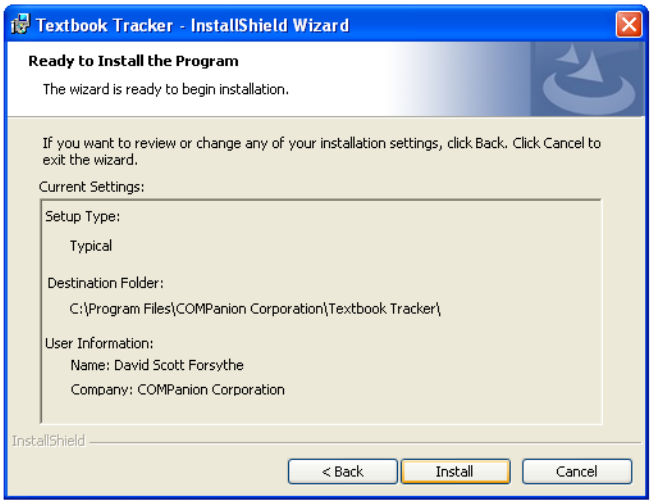
Step 4. The COMPanion Corporation Electronic End User License Agreement appears. Read the license carefully and choose the **I accept the terms in the license agreement** option, followed by **Next**. If you do not accept the terms of the license, click the **Cancel** button.

Textbook Tracker - InstallShield Wizard
License Agreement
Please read the following license agreement carefully.
COMPanion Corporation Electronic End User License Agreement
NOTICE TO USER: THIS IS A CONTRACT. BY INSTALLING THIS SOFTWARE YOU ACCEPT ALL THE TERMS AND CONDITIONS OF THIS AGREEMENT. Unauthorized use of this software or related materials can result in civil damages and criminal penalties.
I accept the terms in the license agreement
I do not accept the terms in the license agreement
Print
InstallShield
< Back
Next >
Cancel

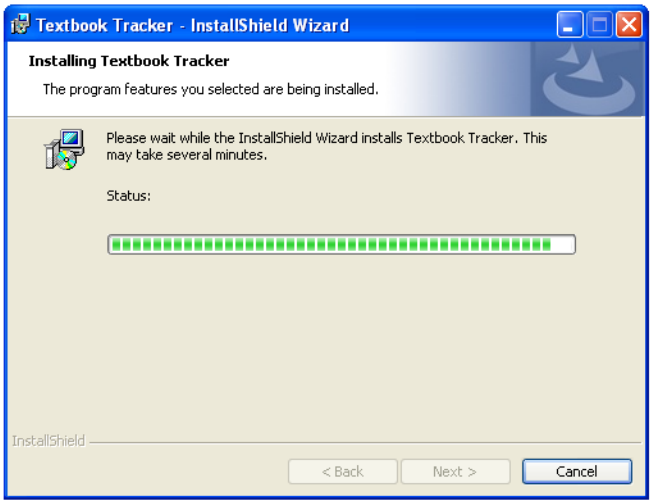
Step 5. Verify that the **Destination Folder** correctly indicates the location where you want Textbook Tracker installed. The default is the **Program Files** directory. This is typically the best location to install Textbook Tracker. Click **Next**.


Textbook Tracker - InstallShield Wizard
Destination Folder
Click Next to install to this folder, or click Change to install to a different folder.
Install Textbook Tracker to:
C:\Program Files\COMPanion Corporation\Textbook Tracker\
Change...
InstallShield
< Back
Next >
Cancel

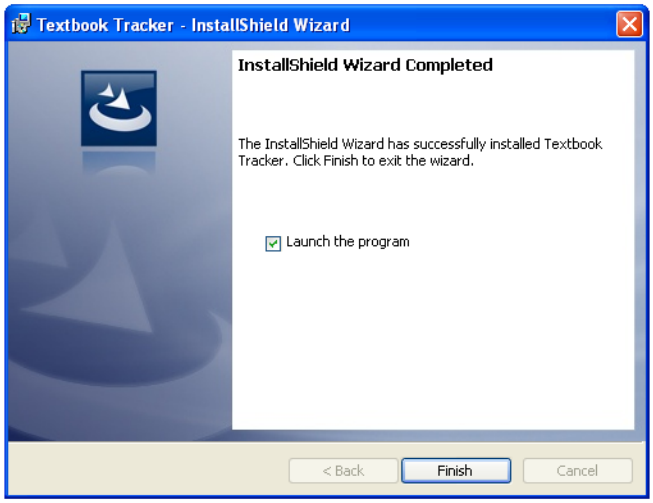
Step 6. On the **Ready to Install** window, click **Install** to continue.



Step 7. During installation, a window similar to the following will show the installer's progress. To abort the installation, click the **Cancel** button.


Textbook Tracker - InstallShield Wizard
Installing Textbook Tracker
The program features you selected are being installed.
Please wait while the InstallShield Wizard installs Textbook Tracker. This may take several minutes.
Status:
InstallShield
< Back
Next >
Cancel

Step 8. When the installation is complete, a confirmation window will appear. Click **Finish**.


Textbook Tracker - InstallShield Wizard
InstallShield Wizard Completed
The InstallShield Wizard has successfully installed Textbook Tracker. Click Finish to exit the wizard.
Launch the program
< Back
Finish
Cancel

Step 9. Eject the CD-ROM and store it in a safe place for future use.

Step 10. An **Textbook Tracker** folder is now installed.

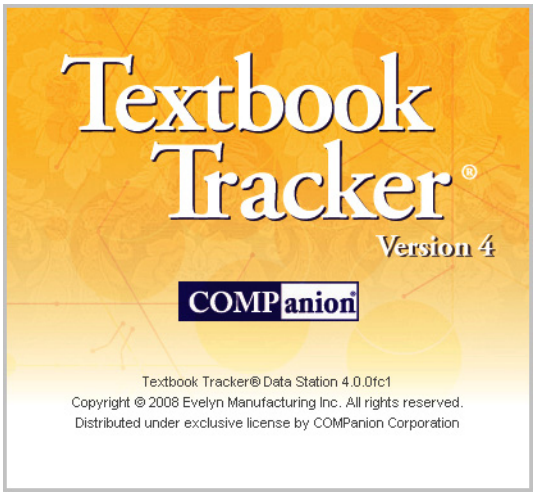
Step 11. Note: This *Getting Started Guide* is included on the Textbook Tracker CD-ROM, but is not installed with the application. You can double-click the documentation icon on the CD-ROM to open it directly or you can copy it to your hard drive and open it there. If the documentation is copied into the **Link Menu** folder, you can access it from within Textbook Tracker.

If you don't have **Adobe's Acrobat Reader** installed on your machine, an installer is included in the **Utilities** folder of the COMPanion CD or from Adobe's website: `http://www.adobe.com/`

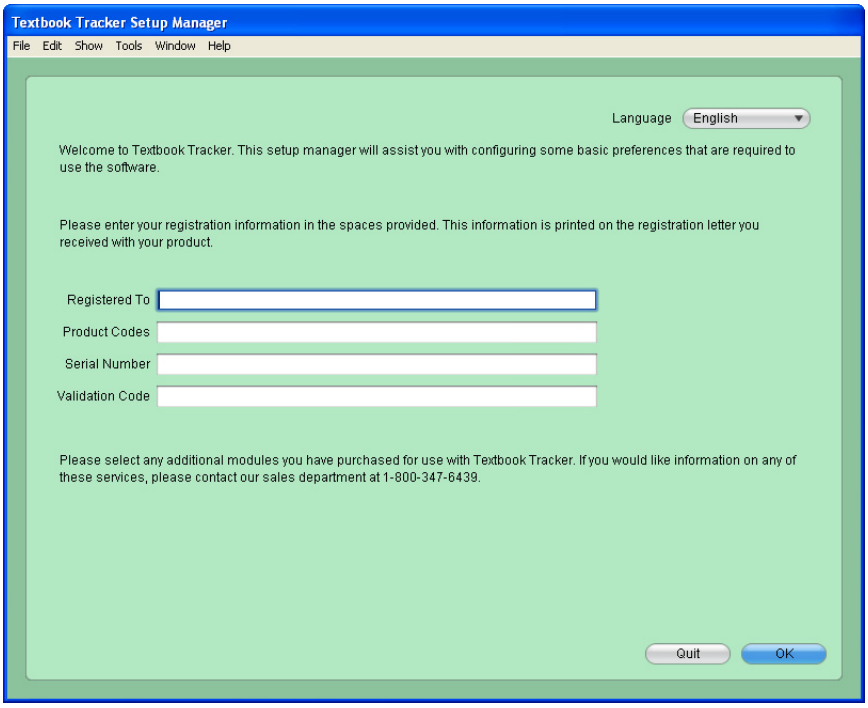
Step 12. Double-click the **Textbook Tracker** icon to start the program.

¡ WARNING!
If you have PPP installed, but not running, the Textbook Tracker Data Station may try to connect through PPP. If the connection window appears, click **Stop** to keep the Data Station from connecting through PPP.

Step 13. When you start Textbook Tracker, the following window appears. If you have not yet registered Textbook Tracker, the **Setup Manager** window appears (described in Step 14). Otherwise, the **Circulation** window appears.


Textbook Tracker®
Version 4
COMPanion
Textbook Tracker® Data Station 4.0.0fc1
Copyright © 2008 Evelyn Manufacturing Inc. All rights reserved.
Distributed under exclusive license by COMPanion Corporation

Step 14. The first time you start the Data Station, the **Setup Manager** window appears. Enter your **Registered To** name, **Product Codes**, **Serial Number** and **Validation Code** from your registration letter and click **OK** to continue through the **Setup Manager**.


Textbook Tracker Setup Manager
File Edit Show Tools Window Help
Language English
Welcome to Textbook Tracker. This setup manager will assist you with configuring some basic preferences that are required to use the software.
Please enter your registration information in the spaces provided. This information is printed on the registration letter you received with your product.
Registered To
Product Codes
Serial Number
Validation Code
Please select any additional modules you have purchased for use with Textbook Tracker. If you would like information on any of these services, please contact our sales department at 1-800-347-6439.
Quit
OK

Step 15. That's it! You've installed your Textbook Tracker Data Station. If you've purchased a single-user license, you're finished installing. If you've licensed additional clients, continue to the next section.

Step 16. If you have questions or problems during installation, contact COMPanion's Technical Support Service at (800) 347-4942 or (801) 943-7277, by fax at (801) 943-7752, by toll-free fax at (888) 515-3883, or by email via: `support@companioncorp.com`

Installing Textbook Tracker Workstations

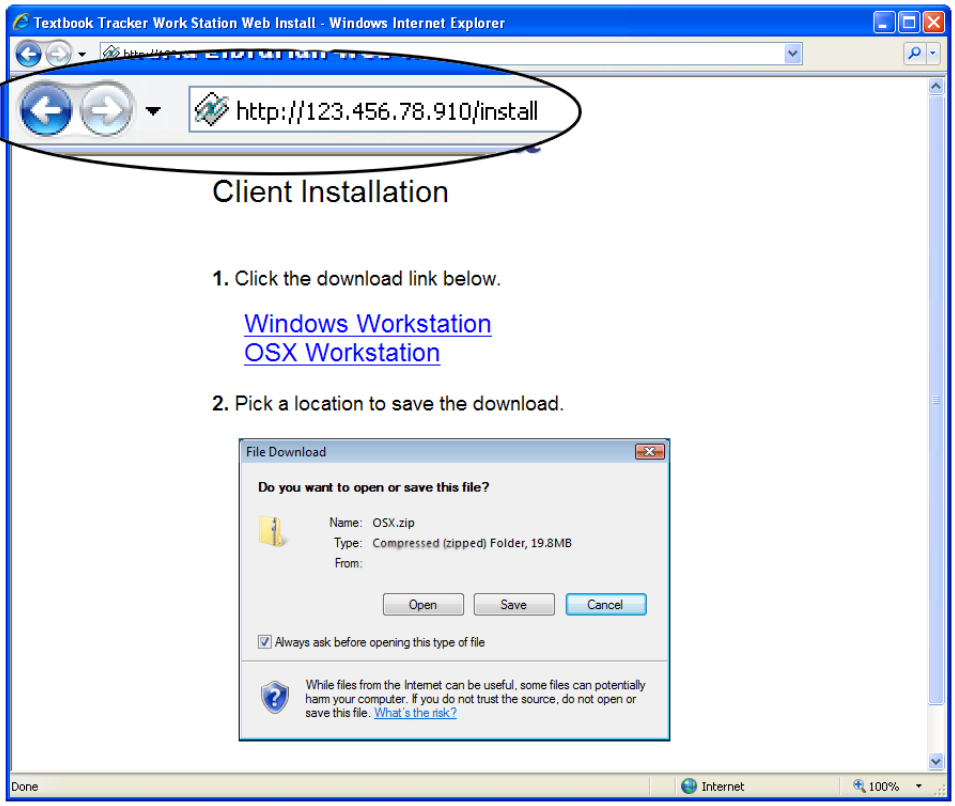
If you have a license that supports multiple clients, you can install Workstations on other computers in your site. Textbook Tracker will install clients over the world wide web.

To install clients over the *world wide web*, make sure that you have an **Administrator User Name** and **Password** set up in the **Operators** system preferences of your the Data Station.

Step 1. Your main **Textbook Tracker Data Station** must be running in order for you to install clients.

Step 2. Determine which computer the client will be installed on. On that machine, open an internet web browser (e.g. an Internet Explorer or Firefox web-browsing window).

Step 3. In the browser **Address** field (located in the upper-left corner of the window), type the IP address of your **Textbook Tracker Data Station** followed by "`/install`" (for Windows users or those running Macintosh OSX) or "`/install_mac`[1]" (for those running Macintosh OS9+).

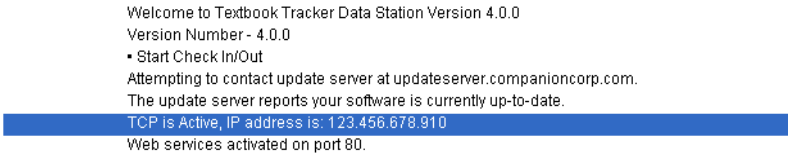

Textbook Tracker Work Station Web Install - Windows Internet Explorer
http://123.456.78.910/install
Client Installation
1. Click the download link below.
Windows Workstation
OSX Workstation
2. Pick a location to save the download.
File Download
Do you want to open or save this file?
Name: OSX.zip
Type: Compressed (zipped) Folder, 19.8MB
From:
Open
Save
Cancel
Always ask before opening this type of file
While files from the Internet can be useful, some files can potentially harm your computer. If you do not trust the source, do not open or save this file. What's the risk?
Done
Internet
100%

1.If you don't have the correct **Java** applet installed on your computer (in this case, **Java Plug-in 1.3** or higher), you will be required to install it before you can download clients. Your browser should automatically detect whether you have the correct Java version installed. If it does not, follow the links and install instructions that the web page provides.

If your Java plug-in is up-to-date or you have just installed it, click the **Grant this session** button on the Java page to begin your **Web Install** session. Textbook Tracker then allows you to download a **Workstation**.

If your browser is having problems running the Java applet, you can use the alternative "`/alt_install`" to download the pre-installed client application to your workstation.

If you are not sure what IP address your Data Station uses, it appears on your **Transaction log** each time Textbook Tracker is launched. It is located approximately three or four lines down and will display **TCP Is Active, IP address is:** [your IP address here].


Welcome to Textbook Tracker Data Station Version 4.0.0
Version Number - 4.0.0
• Start Check In/Out
Attempting to contact update server at updateserver.companioncorp.com.
The update server reports your software is currently up-to-date.
TCP is Active, IP address is: 123.456.678.910
Web services activated on port 80.

If you have problems locating your IP address, please contact your network administrator for further assistance. If your network administrator is not available, feel free to contact the COMPanion Technical Support team.

Step 4. If you performed the latter step correctly, the **Textbook Tracker Client Installation** page should appear, requiring that you input your **Login User Name** and **Password**. Your user name and password are the same found on the **Administration** preferences window of your **Textbook Tracker Data Station**.

Step 5. From the provided links, select the appropriate Workstation to install: **Windows Workstation** or **OSX Workstation**.

Step 6. The client installer will be downloaded to your machine. After it has finished downloading, an **Textbook Tracker** folder will appear on your operating system desktop with the appropriate installation files inside (this folder can be moved anywhere on your machine, it's only installed on the desktop to make it easier to find).

Step 7. Double-click on the **Textbook Tracker** installer icon to begin installation.

Client Installer Resources

If you have a *persistent internet connection* (i.e. you don't have to dial-up to establish a connection), Textbook Tracker will automatically verify that you have the necessary client **Installer Resources**. If any are missing, they will be automatically downloaded from our COMPanion server or created by the Data Station.

However, if this process fails, you'll have to manually place these resources into your **Textbook Tracker Support** folder. If this is necessary, please contact our Technical Support team and follow their guided step-by-step instructions. **Installer Resource** files can be found on COMPanion CD-ROMs or downloaded from the COMPanion website: `www.companioncorp.com`

Configuring Textbook Tracker Web Workstation

Web Workstation is an optional feature of Textbook Tracker. This feature is activated by information you enter into the **Registration** window during installation.

Step 1. Under the **Edit** menu, select **System Preferences (Cmnd/Ctrl+;)**.

Step 2. In the **System Preferences** window, select the **Site Information** icon.

Step 3. Set the **Web Setting** tab for users who will be accessing Textbook Tracker over the internet *(see "Web Setting tab" on page 71)*.

Step 4. To use Web Workstation, launch your web browser (for example, Mozilla Firefox or Microsoft's Internet Explorer).

Step 5. In the address field of your browser window, enter the IP address of your Data Station (the IP address is displayed in Textbook Tracker's transaction log when you first launch the Data Station) or DNS name assigned to that IP address by your system administrator. The address field is usually located at the top of the browser window and is usually labeled either **Address**, **Location**, or **Go To**.

Step 6. If you changed the port value when setting the Web preferences, type a colon followed by the port number at the end of your *www* address. For example, if the location of your Data Station is (`www.alexweb.com`) and you changed the port value to 81, type "`www.alexweb.com:81/`" in the **Address** field (without the quotation marks).

- NOTE -

If you are not familiar with browsers, domain names, IP addresses or other information mentioned above, see your system administrator or other qualified individuals in your organization to help you get set up.

Setting Up Hosted Service

COMPanion Corporation offers a number of application services that are hosted directly at one of our private, first-class, data network facilities. These services are hosted on secure, access-restricted machines that are protected by battery backup, housed in a climate-controlled environment, and connected to the internet via a 100MB (minimum) fiber-optic connection. All services are monitored electronically by certified professionals 24/7, so if a problem *does* occur, it can be addressed quickly. Equipment modification and upgrades are completed swiftly and scheduled during off-hours and low-use periods.

Hosted services that store customer data are maintained on hardware that is configured with hard disk drives in a RAID 5 array; in the event of hard drive failure, service will *not* be interrupted. All customer data is backed up daily and stored on COMPanion servers, with an additional daily backup stored securely off-site at a separate data network facility. Daily backup data is kept for seven (7) days as part of the dedicated **Hosting Service Agreement**.

This data *cannot* be accessed outside of COMPanion's hosted services. However, for a nominal fee, a DVD-based hard copy of your data may be obtained for safekeeping and is offered by COMPanion as an additional measure of protection and peace of mind.

In the unlikely event that your data needs to be restored from a backup, COMPanion will perform that service at no additional charge as quickly as possible.

COMPanion respects your hosted data as confidential and *will not* distribute any of your data's contents to a third party without prior written authorization. Any authorized third party with which COMPanion does business would guarantee the same expectation of confidentiality.

If you would like to license the use of COMPanion's hosted service or would like to order a DVD-based backup of your data, contact your sales representative at (800) 347-6439 for information and pricing.

If you've already licensed use of COMPanion's hosted service and have questions or problems during installation, contact COMPanion's 24-hour Technical Support Service at (800) 347-4942 or by email.

This section will help guide you through Textbook Tracker's hosted installation process.

> **- NOTE-**
>
> During instruction, COMPanion assumes that you have a basic working knowledge of your computer's operating system.

Make sure to have the registration letter that came with your software—it contains the required username, password, and serial number information required during installation.

If you are not familiar with browsers, domain names, IP addresses or other information mentioned above, see your system administrator or other qualified individuals in your organization to help you get set up. If you have questions or problems during installation, contact COMPanion's 24-hour Technical Support Service at (800) 347-4942 or (801) 943-7277 or by email via: *support@companioncorp.com*.

Hardware and Operating System Recommendations

Textbook Tracker's hosted software solution has been developed to work under both Windows and Macintosh-based operating systems. With the exception of subtle differences between the controls at the tops of windows and minor differences in operating system functionality, the program operates identically across both platforms.

Here are the minimal hardware and operating system requirements for using Textbook Tracker's hosted service:

System Requirements for Textbook Tracker's Hosted Workstations

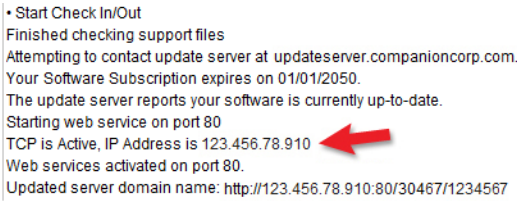
	Minimum	Recommended
Textbook Tracker v4: Workstation	Mac OS 10.5+ Windows XP+ G4, Pentium 4+ (or equivalent) 1GB of RAM 200 MB of free HD space TCP/IP Network 1024 x 768 Screen Resolution	Mac OS 10.6+ Windows 7 or 2008 Server X86, Multi-Processor/Core 2 GB of RAM (or higher) More than 200MB of free HD space

Textbook Tracker Hosted Service Communication Systems

Textbook Tracker Workstations require TCP/IP to communicate between hosted Data Stations and their clients.

> **¡ WARNING!**
>
> A fixed TCP/IP address for each hosted Textbook Tracker Data Station will be provided to you and cannot be changed or dynamically allocated.

When you subscribe to Textbook Tracker's hosted services, you'll be provided with a completely comprehensive *tthost.companioncorp.com* URL. You won't need to worry about setting up the server IP address because during the installation process, if you follow the steps correctly, the client will connect to the hosted Data Station and aquire the appropriate IP/DNS. Your hosted IP/DNS will appear in your **Transaction log** each time the Textbook Tracker Workstation is launched. It is located approximately three or four lines down and will display **TCP is Active, IP Address is**: [your IP address here].


• Start Check In/Out
Finished checking support files
Attempting to contact update server at updateserver.companioncorp.com.
Your Software Subscription expires on 01/01/2050.
The update server reports your software is currently up-to-date.
Starting web service on port 80
TCP is Active, IP Address is 123.456.78.910
Web services activated on port 80.
Updated server domain name: http://123.456.78.910:80/30467/1234567

> **- NOTE-**
>
> Make sure that **Port 80** and **Port 30467** is open on your firewall; these ports are used for web access and client-server communications (i.e. communications between the Data Station and Workstations). If you don't have the proper authorization or are not familiar with ports and firewalls, please contact your system administrator or other qualified individuals in your organization to help you get set up. If you have questions or problems during installation, contact COMPanion's 24-hour Technical Support Service.

Setting Up Textbook Tracker's Hosted Service

Make sure that the machine on which you will be downloading and running Textbook Tracker meets the minimum recommendations for both hardware and operating system software.

All of your information (data) will be stored at one of COMPanion's secure data network facilities.

After licensing use of Textbook Tracker's hosted service, you can download Textbook Tracker's Workstation clients on other computers over the world wide web.

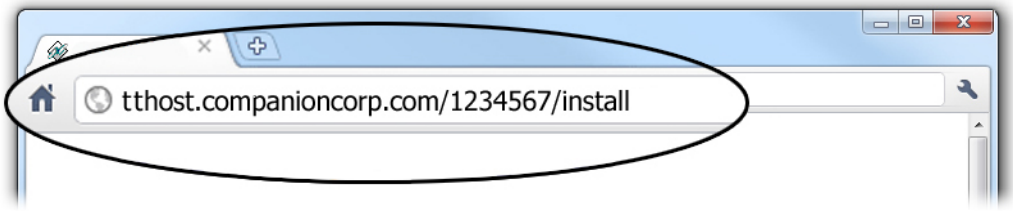
To download clients over the world wide web, make sure you have the **Login User Name** and **Password** provided to you in your registration letter; these will later be available to edit or change in the **Operators** system preferences of your hosted Data Station.

Detailed below are the general steps required to setup Textbook Tracker's hosted service:

Step 1. Since COMPanion hosts your main **Textbook Tracker Data Station**, it will already be up and running and ready for you to download your Workstation clients.

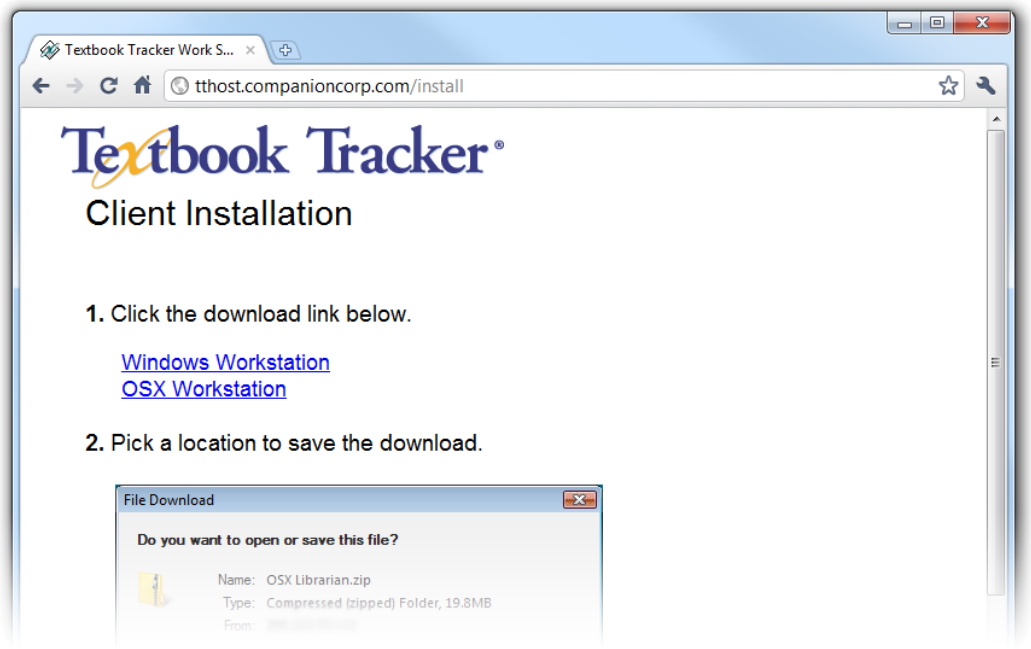
Step 2. Determine which computer the client will be installed on. On that machine, open an internet web browser (e.g. **Internet Explorer**, **Firefox**, **Safari**, or optionally **Chrome**).

Step 3. In the browser **Address** field (located in the upper-left corner of the window), type the address provided to you in the Textbook Tracker hosted registration letter followed by the serial number and "*/install*" (e.g. this address will look something like this: *tthost#.companioncorp.com/#######/install*



Step 4. If you performed the latter step correctly, the **Textbook Tracker Hosted Client Download** page should appear, requiring that you input the **Login User Name** and **Password** provided to you in your registration letter. Please note that login usernames and passwords *are* case-sensitive; that is, they require the proper invocation of uppercase and lowercase letters.

Step 5. From the provided links, select the appropriate client to download:
- **Windows Workstation**
- **OSX Workstation**



Step 6. After selecting the appropriate client to download, you will be prompted to save the file; choose to **Save File** and click **OK**.

Step 7. The zipped **Textbook Tracker** client file, which contains the appropriate client folder inside, will be downloaded to your designated operating system downloads folder.

Step 8. The downloaded file will be compressed (zipped); extract all of the contents of the file before proceeding. Usually, the extracted folder will appear in the same directory where the *.zip* file was downloaded; in this case, you will have a file and a folder in the directory with the same name—either **Textbook Tracker Workstation (Mac/Win)** respectively—the only difference being that one is zipped.

Step 9. If you haven't already moved the extracted client folder to your desktop, COMPanion recommends that you do so now. The client folder can be moved anywhere on your machine—it's generally moved to the desktop to make it easier to find.

Step 10. Inside your newly extracted folder, double-click on the **Textbook Tracker** Workstation installer icon (*.exe* or *.dmg*) to launch the application.

Step 11. Next, the Workstation application will launch and automatically connect to the hosted Data Station.

Although it's nearly foolproof, if any part of the installation process goes awry, please contact COMPanion's Technical Support Service at (800) 347-4942 or (801) 943-7277 and follow their guided, step-by-step instructions.

Notes:

Textbook Tracker Basics

This section describes the main system menus and basic operational rules used in Textbook Tracker.

Textbook Tracker menus follow operating system standards for Macintosh and Windows. For example, the **File** and **Edit** menus in Textbook Tracker are very similar to the **File** and **Edit** menus in other applications. Additional menus have purposes specifically related to textbook management.

Textbook Tracker looks and operates almost exactly the same on both Macintosh and Windows. However, these operating systems *are* different, therefore, there are some minor variations between environments. For example, on the Macintosh you press the <Cmnd> key for menu shortcuts and in Windows you select the <Ctrl> key. Windows and Macintosh have different controls for minimizing, closing, and resizing windows. In order to keep our documentation as clear as possible, this guide will generally discuss actions rather than operating system-specific commands or controls.

Rather than "click the close box at the upper-right of your window," this guide will read "close the window," and allow the user to select the operating system-specific commands required to control Textbook Tracker.

This guide contains images from both Windows and Macintosh versions of Textbook Tracker.

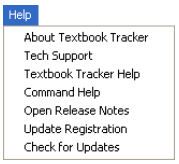
Macintosh & Windows Command Differences

Macintosh Command Key	Windows Command Key	Usage
<Cmnd>	<Ctrl>	Perform Menu shortcuts.
<Option-Tab>	<Ctrl-Tab>	Perform Authority Control.
<Option>	<Ctrl>	Display Tool Tip.
<Option>	<Alt>	Used to modify commands.

The following sections describe the basic operational elements found in Textbook Tracker.

Textbook Tracker Wiki Help

Almost every window in Textbook Tracker will have a special, round **Wiki Help** button; clicking this button opens your default web browser to the related on-line **Wiki Help** file. If you don't have a persistent internet connection, an offline version of **Help** can be made available. These "help" windows contain information directly related to the window you are using and explain, in detail, how to use them.



Help Menu

On Macintosh, there is an **Textbook Tracker** system drop-down menu that contains the **About Textbook Tracker** and **Tech Support** selections. There is also a **Help** menu that contains the **Textbook Tracker Help**, **Open Release Notes**, **Update Registration**, and **Check for Updates** selections.

On Windows, all these selections are located under the **Help** menu.

About Textbook Tracker—Shows copyright and version information.

Tech Support—This opens the **Email** subtab option under the **Support** tab of the main **Circulation** window, allowing you to send email to COMPanion if you are connected to the internet—even if you don't have your own SMTP (simple mail transfer protocol) address configured *(see "SMTP tab" on page 58)*.

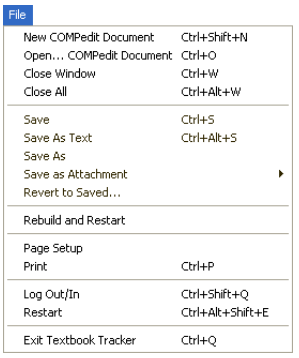
Textbook Tracker Help—This button opens your default web browser to the main index page of Textbook Tracker's on-line **Wiki Help**. If you don't have an internet connection, an offline version of **Help** can be activated (if installed on your system). Offline **Help** documents are installed in the **Help** folder inside your **Textbook Tracker folder**. To get the latest offline **Help** files, please contact Textbook Tracker's 24-hour Technical Support team.

Open Release Notes—If the Textbook Tracker release notes are available, this selection displays them. If available, this document is located in your **Textbook Tracker folder** with the name **Textbook Tracker Release Notes.txt**.

Update Registration—This will open Textbook Tracker's **Registration** window, allowing you to update your registration information. Textbook Tracker will require a restart once your registration information has been updated.

Check for Updates—This selection will check for any available Textbook Tracker updates. If there are any available, they will be presented and you will have the option of choosing which you would like installed. You should archive your data before performing any update; we recommend that you **Read** the release notes thoroughly beforehand to ensure that your hardware meets the minimum system requirements and so that you are aware of any major software enhancements.

File Menu



The Textbook Tracker **File** menu provides the following selections:

New COMPedit Document (Cmnd/Ctrl+Shift+N)—Opens a new COMPedit document; COMPedit is Textbook Tracker's integrated word processor *(see "COMPedit: The COMPanion Word Processor" on page 44)*.

Open... COMPedit Document (Cmnd/Ctrl+O)—Opens the standard operating system explorer window used to locate files. When you select a document from this window, Textbook Tracker will open it (if it is able). Use this command to open COMPedit documents, *.TXT* documents, MARC documents, MicroLIF documents and other files for viewing.

Close Window (Cmnd/Ctrl+W)—Closes the topmost Textbook Tracker window.

Close All (Cmnd/Ctrl+Alt+W)—Closes all Textbook Tracker windows except for the **Circulation** window.

Save (Cmnd/Ctrl+S)—Saves the contents of the topmost Textbook Tracker window.

Save As—Allows you to save *.VWP* documents to specific locations on your hard drive.

Save as Attachment—This allows you to save text from a COMPedit document as a **Patron**, **Item**, or **Tech Support Message**.

Revert to Saved...—Changes made to the current record are discarded and the original record is displayed in the window.

Archive Now—Performs an immediate backup of your valuable Textbook Tracker Data. For more information on archiving, please review "How Archiving Works" on page 57.

Rebuild Now—Performs an immediate **Rebuild** of your valuable Textbook Tracker Data. Before rebuilding, Textbook Tracker will ask if you would like to perform an archive before rebuilding (strongly recommended) and then ask if you would like to restart Textbook Tracker after a successful rebuild.

Page Setup—Operating system standard function that sets the page up for printing.

Print (Cmnd/Ctrl+P)—Prints the information contained in the window with focus (topmost window). For example, if the **Patrons** management window is current, information for the selected patron is printed when this command is selected. If the **Circulation** window has focus, then the transaction log is printed.

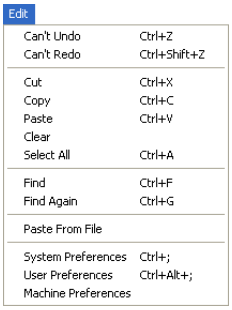
Print to PDF—This allows you to save any finished reports or COMPedit world processor documents as Adobe PDF files (Macintosh only).

Log Out (Cmnd/Ctrl+E)—This command closes the **Circulation** window and disallows anyone without proper authorization to access **Textbook Tracker**. Instead, an **Textbook Tracker Login** window appears, awaiting a correct **User Name** and **Password**. If a high-level user steps away from the Data Station and doesn't want to quit or restart Textbook Tracker, the **Log Out** function provides this security. The **Require Operators to Login** box in **Operator System Preferences** (see *page 111) must* be checked for this option to work.

Restart (Cmnd/Ctrl+Alt+Shift+E)—Logs out the current operators, closes all windows, restarts the Textbook Tracker program, and if **Require Operators to Login** is turned on, brings up the **Login** window. If no security has been activated, Textbook Tracker just restarts to the **Circulation** window.

Quit/Exit Textbook Tracker (Cmnd/Ctrl+Q)—Quits the Textbook Tracker program.

Edit Menu



This menu includes standard editing functions. You can cut, copy and paste text, clear a field, select all text, and paste from a file. Information about commands which are specific to Textbook Tracker are included below.

Undo (Cmnd/Ctrl+Z)—This command only undoes typing or cut-and-paste operations in individual fields or in the word processor. It does *not* undo operations from other menus, commands and controls.

Redo (Cmnd/Ctrl+Shift+Z)—An undo for the undo.

Cut, Copy and Paste—You can cut, copy, and paste text from certain fields to others within Textbook Tracker. For example, you can cut text from the **Title** field and place it in the **Notes** field. You cannot cut and paste entire site records. If you need to transfer entire records into another application, use the **Export** function to save the records you need in a format compatible with other programs.

Clear—Clears the selected text or selected list elements.

Select All (Cmnd/Ctrl+A)—Selects all the text in the current edit field, current word processor document, or list.

Find (Cmnd/Ctrl+F)—This selection opens the **Find** window. Dependant upon which window has focus, **Find** can be used to locate a specific record from your database or text in a word processing file.

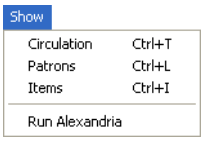
Find Again (Cmnd/Ctrl+G)—Finds the next matching record or data in the word processor.

Paste From File—Allows the user to paste information from a file.

System Preferences (Cmnd/Ctrl+;)—This selection opens the **System Preferences** window, which is used to customize Textbook Tracker to suit your needs *(see "Setting System Preferences" on page 47)*.

User Preferences (Cmnd/Ctrl+Alt+;)—This selection opens the **User Preferences** window, a way of setting "local" preferences that are tied to and migrate with a specific operator.

Machine Preferences—This selection opens the **Machine Preferences** window, where settings apply to just one computer.



Show Menu

Use this menu to move between various Textbook Tracker services and modules such as **Patrons**, **Items**, and **Circulation**. For example, if you need to manage patron information, select **Patrons** from the **Show** menu. To check items out or perform other transactions, select **Circulation**.

Most of the selections in the **Show** menu have a corresponding section in this guide. Refer to each specific section for detailed information about each function.

Circulation (Cmnd/Ctrl+T)—Shows the **Circulation** window. Select this option if you want to check out, check in, place holds, charge fines, place reservations, accept payments, or perform inventory and other circulation functions. The **Circulation** window is *always* open while Textbook Tracker is running; use this menu command to bring it to the forefront.

Patrons (Cmnd/Ctrl+L)—Opens/shows the **Patron** management window. Select this command to examine, add, modify, or remove patron records.

Items (Cmnd/Ctrl+I)—Opens/shows the **Item** management window. Select this command to examine, add, modify, or remove title or copy records from your collection.

Run Alexandria—If an Alexandria Data Station is installed on the same computer, Textbook Tracker is able to quickly launch it if you select **Run Alexandria** from the **Show** menu. In order to use this feature, you must first provide the correct directory path information in the **Alexandria Application Location** field located in the **Alexandria** tab of the **System Preferences** *(see "Alexandria Preferences" on page 91)*.

Tools Menu

Export—Opens the **Export** utility, allowing you to export items, patrons, or other miscellaneous data from the Textbook Tracker database.

Import—Opens the standard operating system explorer window used to locate files. Import files can also be "dropped" onto the **Circulation** window.

Inventory Helper—Opens the **Inventory Helper** window, allowing you inventory, modify, and print reports on all the items in your collection *(for more information, please review the "Inventory Helper" section of the Textbook Tracker Online Wiki)*.

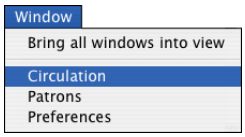
Reports—Opens the **Reports** window, allowing you to find, add, duplicate, remove, or view a report category such as **Patron Reports**, **Item Reports**, or **Circulation Reports** *(see "Introduction to Reports" on page 153)*.

Utilities—Opens the **Utilities** window, allowing you to make global changes on batches of information in your Textbook Tracker database *(see "Performing Utilities" on page 147)*.

System Reports—Opens the **System Reports** window, where reports delivered to the system are available for viewing from any client connected to the Data Station. Linked reports stored in the system are also available for operators so they can manage or remove them, etcetera *(for more information, please review the "System Reports" section of the Textbook Tracker Online Wiki)*.

SIF Management—Opens the **SIF Management** window, allowing you to set up and manage your **Schools Interoperability Framework** (SIF), an industry-supported technical protocol that ensures that diverse primary and secondary (K-12) instructional and administrative software applications share information (data formats) and work together seamlessly *(for more information, please review the "SIF Management" section of the Textbook Tracker Online Wiki)*.

Window Menu



As you open new windows in Textbook Tracker, the **Window** menu will contain a list of all currently active windows. The example **Window** menu in the margin shows that the **Circulation** window is open and active and the **Patrons** and **System Preferences** windows are also open.

To choose a window, select it from this menu. The window you select gets focus and becomes the active window.

If you select **Bring all windows into view**, all minimized windows will appear, with focus placed on the **Circulation** window.

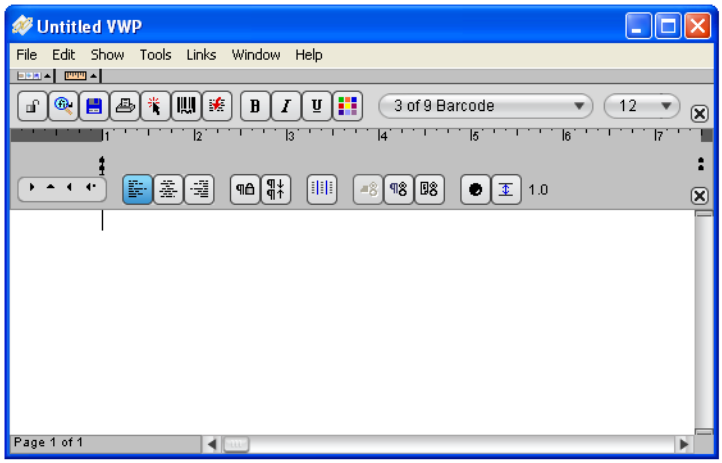
When you close a window, it is removed from this menu.

COMPedit: The COMPanion Word Processor

Integrated into Textbook Tracker is a powerful word processor. These days, everyone owns at least one word processor. Why, then, is the Textbook Tracker approach to an integrated word processor any different? Well, here are a few reasons:

- COMPedit is available integrated within Textbook Tracker *and* as a stand-alone product.
- The word processor is used throughout Textbook Tracker to display reports and other informational windows. In most programs, this information is displayed in a standard system window.
- Allows users to save reports for future reference. COMPedit documents can be viewed, saved and printed.
- Allows users to customize reports. You can pick the font, eliminate unwanted information, enter notes, change the font size, update the heading, and much more. You can have your reports done *your way*.
- Quickly create your *own* reports by cutting and pasting pieces of information from different Textbook Tracker reports.
- Send reports to others via email attachments—since you can save reports electronically, you can send them electronically.
- COMPedit uses a highly efficient virtual memory scheme, which allows it to support *very* large documents in a limited amount of memory. Therefore, you can view large import files before you import them—even 100MB files!
- Since all reports are created as word processor documents, you can preview each report before you print them. Other word processors might allow you to view reports on-screen, but usually only one page at a time, or a very limited page range. With COMPedit, you can see it all.
- COMPedit can provide your institution with a standard, cross-platform tool for creating and exchanging reports. All documents are supported for both Macintosh and Windows-based operating systems—a document created on one system can be viewed on the other.
- Textbook Tracker can prepare several reports for printing simultaneously. Most systems won't let you print more than one report at the same time—after all, in what order would the pages come out of the printer? With the Textbook Tracker approach, all reports are prepared in COMPedit and can be printed at a later time.
- COMPedit has the ability to support picture files created in drawing or paint programs—just paste them into your document.
- Special support is specifically provided for code 39 barcodes so that they are printed at the highest possible resolution, at the highest possible quality setting your printer is capable of handling.

To create a new COMPedit document, select **New COMPedit Document** from the **File** menu. You'll see a window similar to this one.



Since most people are familiar with word processors, COMPedit's basic operations will not be documented. However, here's a quick overview of some of the special features available with COMPedit.

- Use the icon above the vertical scroll bars to hide/show the word processor tools or show/hide the graphical ruler.
- Click on the lock icon to lock or unlock the document. Locked documents can *not* be modified.
- Use the other icon controls to find text, save a document, print your document, set a page break, insert the date, insert the time, insert the current page number, etc.
- Indents, margins, left, right, center and decimal tabs are supported.
- **Left**, **Center**, and **Right** aligned paragraphs are supported.
- **Font**, **Size**, and **Style** controls are available for any character. Style includes colored text.
- Paragraph "keep together" controls are supported.
- Supports headers and footers. To create a header or footer, drag the controls above and below the vertical scroll bars to create a header or footer area.
- Supports restricted column viewing for tabbed columns. When this is turned on, text that might overflow into another column is visibly truncated so that printed columns look nice. Since the data is still in the report, adjusting column width will expose more data. This is a very useful feature for viewing tabular-type reports.
- Supports internal hot links for URL, COMPedit links and multi-media display (Ctrl/Cmnd-click on a URL in COMPedit to open the link in your selected browser). This capability is currently only available for documents created by Textbook Tracker.
- You can move your COMPedit documents to other word-processing programs using the **Save As Text** option. However, you'll lose all document formatting. Inversely, you can move other word-processing documents into COMPedit using *their* **Save As Text** option; COMPedit can open all standard *.TXT* documents. However, you'll lose all document formatting.

NOTE:
Make sure to read the Read-Me file thoroughly for important information regarding the update.

Performing Textbook Tracker Software Updates

There are several ways you can perform software updates from within Textbook Tracker. If you have an internet connection, you can check for Textbook Tracker updates using COMPanion's **Update Server**. If you perform the **Check for Updates** utility, and an update is available, a description of the update is shown under the **Get Read-Me** selection. From there, you can choose to update your Textbook Tracker Data Station or wait for a future date.

If you are sure you want to update to the newest version of Textbook Tracker, an easier method is to use the **Check for Program Updates Now** button, located in your **Updates System Preferences**. You can also select **Check For Updates** from the main system **Help** menu.

You can also download the newest COMPanion and Textbook Tracker software updates from the official website (`www.companioncorp.com`). Just follow the **Products** and **Software Updates** hyperlinks. You must enter your Textbook Tracker registration name, email address, school/company and serial code in order to proceed with the download; these can be found on the registration letter you received when you purchased Textbook Tracker or when you renewed your support contract.

If you have accidentally misplaced your registration letter, COMPanion's 24 hour Technical Support team will be able to assist you.

For convenience, larger organizations may license the use of an Textbook Tracker **Update Server**; contact your sales representative at (800) 347-6439 for information and pricing.

If you don't have a reliable internet connection (or are unable to download the newest updates), you can contact COMPanion (via email or Tech Support at 800-347-4942) and request that an Textbook Tracker Update CD-ROM be sent to your location.

Setting System Preferences

Textbook Tracker has a variety of preferences that can be adjusted to make changes to the system and its behavior.

- **System Preferences** work the same way for every computer connected to your Textbook Tracker system.
- **Machine Preferences** apply to settings that may be local (i.e. just on one computer), not system, but can't migrate with an operator from machine to machine. For example, one of several school computers can be set to have Spanish as the default language instead of English.
- **User Preferences** are a way of setting "local" preferences, tied to a specific operator. For instance, if you want English to be the main language of choice for all Textbook Tracker connections, it makes sense to set this once (in **System Preferences**) for all computers instead of having to go from computer to computer. However, if you wanted every computer that you (or another operator) log into to be set to a specific language (e.g. Spanish), then you must configure your **User Preferences**. Then, when your log in, your **User Preferences** (e.g. Spanish) are applied.

System Preferences determine how your patrons use the school, how your items are managed and how your school operates; they are used to customize Textbook Tracker's circulation settings, default values for barcodes, settings for cataloguing, and restrictions for Workstations.

With **System Preferences**, you can also configure your site policies (i.e. the rules that dictate how your resources are used). You can set policies that determine how each item in your collection circulates and how certain patron groups are allowed to use your school. You can also configure policies that determine how long an item can be checked out, period due dates, fine amounts, etc.

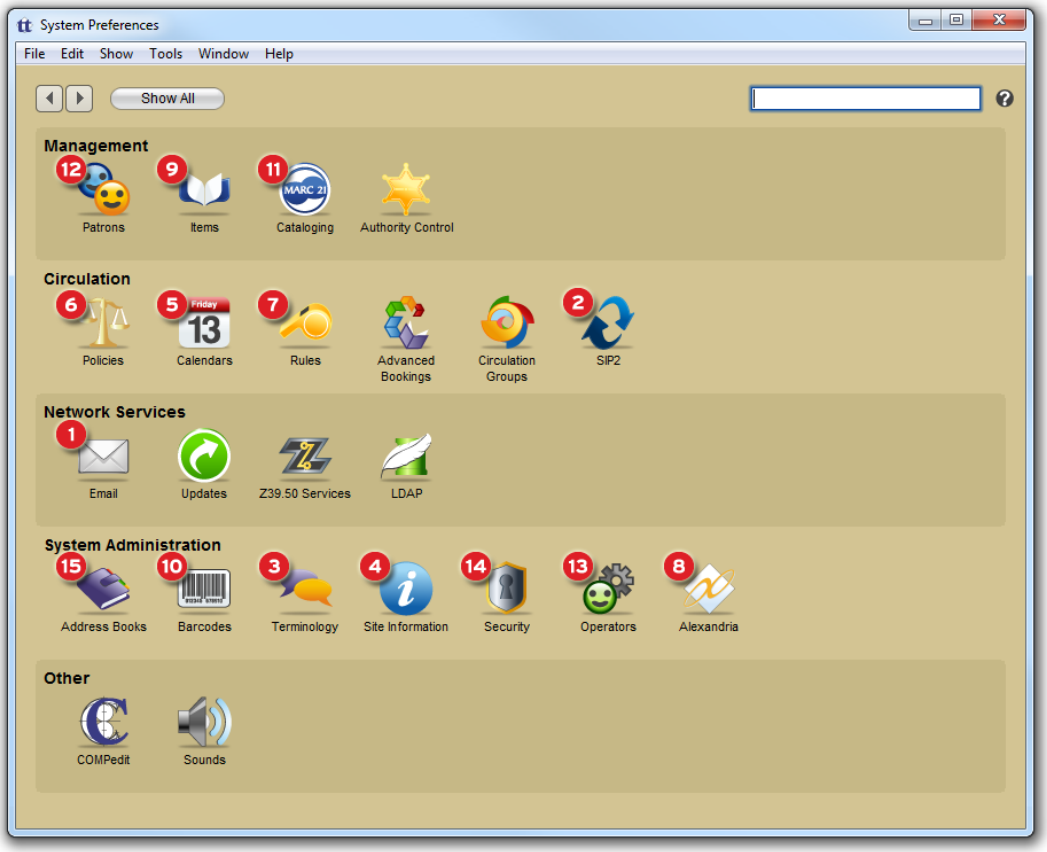
To set up or change Textbook Tracker preferences, you must first open the **System Preferences** window using the **Edit** menu. You may also use the "`Ctrl+;`" (Windows) or "`Cmnd+;`" (Macintosh) shortcut command.

Textbook Tracker's **System Preferences** are grouped in an easy-to-use and easily-identifiable layout divided into the following categories: **Management**, **Circulation**, **Network Services**, **System Administration**, and **Other**. Once the **System Preferences** window appears, click on the corresponding icon(s) to view the available preference settings.

Please keep in mind that certain preferences may not be available for certain clients. An Textbook Tracker Data Station may have more preferences than a Workstation or Web Workstation. Some preferences will only become active after you have licensed them (e.g. **Z39.50 Services**). If you have not licensed a particular feature, the corresponding icon will not appear in the **System Preference** window.

Getting Started: Configuring System Preferences

Although this is not a complete and comprehensive list of every one of Textbook Tracker's **System Preferences** in their entirety, the following provides a summary of the preferences that COMPanion recommends you initially set and the order in which you should set them after installation. Review the corresponding preference sections for information on how to configure these initial settings for your site.



COMPanion recommends that you configure your **System Preferences** in the following order:

01) Email—Found in the **Network Services** section, this preference determines whether Textbook Tracker should use a built-in or external mail service *(see "Email Preferences" on page 57)*.

02) SIP2—Found in the **Circulation** section, this preference is used to enhance the SIP2 protocol. It should only be enabled if Checkpoint SIP2 hardware is in use *(see "SIP2 Preferences" on page 59)*.

03) Terminology—Found in the **System Administration** section, this preference allows those who use Textbook Tracker outside of the United States to have complete customization over their local vocabulary and currency standards *(see "Terminology Preferences" on page 63)*.

04) Site Information—Found in the **System Administration** section, use this preference to configure general information about your site and to set pre-determined scheduled events throughout the week *(see "Site Information Preferences" on page 69)*.

05) Calendar—Found in the **Circulation** section, set up calendars for use in your school; calenders are used to schedule open days, closed days, period due dates and notes *(see "Calendar Preferences" on page 73)*.

06) Policies—Found in the **Circulation** section, set guidelines for site operations *(see "Policy Preferences" on page 75)*.

07) Rules—Found in the **Circulation** section, use this preference to configure information about temporary barcodes and determine how often the transaction log is saved. Create text for inclusion in the body of patron notices *(see "Rules Preferences" on page 81)*.

08) Alexandria—Found in the **System Administration** section, use this preference to configure if you're licensed to use Textbook Tracker *(see "Alexandria Preferences" on page 91)*.

09) Items—Found in the **Management** section, use this preference to configure information about items, such as: barcode ranges, barcode leaders, default policies, terminology, and catalogue settings *(see "Items Preferences" on page 93)*.

10) Barcodes—Found in the **System Administration** section, use this preference to configure how Textbook Tracker should increment new patron and item barcode numbers *(see "Barcodes Preferences" on page 97)*.

11) Cataloging—Found in the **Management** section, use these preferences to configure general information about your subject sources, medium pictures, and leading articles *(see "Cataloging Preferences" on page 101)*.

12) Patrons—Found in the **Management** section, use these preference to configure information about patrons, such as: barcode ranges, barcode leaders, default policy, and grade table *(see "Patrons Preferences" on page 105)*.

13) Operators—Found in the **System Administration** section, use this preference to set up users and access levels; activate passwords *(see "Operators Preferences" on page 111)*.

14) Security—Found in the **System Administration** section, use this preference to this preference is used to assign access levels for operators. An operator's access level determines what actions they are allowed to perform *(see "Security Preferences" on page 115)*.

15) Address Book—Found in the **System Administration** section, use this preference to configure address books for wide-area or multi-collection access *(see "Address Book Preferences" on page 119)*.

16) Circulation Groups—Found in the **Circulation** section, use this preference to create new **Circulation Groups** which provide you with an easy way to track statistics and allow users to meaningfully bunch together groups of transactions under a single, user-designated code *(see "Circulation Groups Preferences" on page 125).*

General System Preference Notes:

Schedule Archives and Rebuilds

Archiving Your Data

Setting automatic **Archives** in Textbook Tracker v4 is a two-fold process. You must configure settings in both your **Site Information System Preferences** (**Scheduled Events** tab) and your **Database Utilities**.

Textbook Tracker has an archiving utility *(see "Rebuild Utility" on page 56)* that can be configured to make complete, regular copies of your valuable Textbook Tracker **Data** and store them in a folder on your hard disk.

The major difference between a backup and an archive is that backups are made on removable media that can be physically stored away from the site. Archiving provides a quick and automatic method of saving your database before you perform large changes (e.g. importing, updates, utilities, or machine upgrades).

How Archiving Works

If the **Archives To Keep** drop-down menu (in the **Scheduled Events** tab of the **Site Information System Preferences** window) is set to anything below four (including zero), the **Archive First** (in the **Status** tab of the **Data Import** window) checkbox *(page 129)* and the **Archive Now** button *(page 54)* will keep five *manual* archives (as though the **Archives To Keep** preference was set to 5) and when a sixth *manual* archive is requested, Textbook Tracker will first create a new data archive before removing the oldest archive in the **Current Archive Folder**.

In other words, every time you click the **Archive Now**[1] button (in the **Scheduled Events** tab) or have the **Archive First** checkbox marked during import, Textbook Tracker will perform a *manual* archive (even if your **Archives To Keep** is set to zero). However, if your **Archives To Keep** preference is set higher than 5, then the **Archive Now**[1] and **Archive First** selections will no longer ignore the **Archives To Keep** preference; in other words, *manual* archives will now be restricted to the specified **Archives To Keep** value.

Textbook Tracker will perform an automatic archive based on the value specified in the **Archives To Keep** drop-down menu. Therefore, if your **Current Archive Folder** contains more archives than the **Archives To Keep** preference states, Textbook Tracker will remove all of the surplus archives (oldest archives first) after it creates a new *automatic* archive.

For example, if you have the **Archives to Keep** preference set to `2` and Textbook Tracker has already created two *automatic* archives in the **Current Archive Folder**, you will be able to add three additional *manual* archives to the folder, equalling five total archives.

If the **Archives to Keep** preference is set to `10` and Textbook Tracker has already created four *automatic* archives in the **Application Support Archive** folder, you will be able to add six additional *manual* archives to the folder.

During an *automatic* archive, if the **Archives to Keep** preference is set to `2` but you have *manually* created three additional archives, Textbook Tracker will create a new automatic archive before deleting the three oldest archives in the **Current Archive Folder** folder. This way, the number of remaining archives will match the value specified in the **Archives to Keep** preference (in this instance, two).

Use the **Refresh** button to update the dates and times for the **Next Scheduled Archive** and **Last Archive** in the **Scheduled Events** tab of the **Site Information System Preference** window.

1.Clicking the **Archive Now** or **Restore From Archive** buttons *can* initiate the **Remote Control** window *(see "Remote Control" on page 445)*.

Scheduled Events tab

Use the **Scheduled Events** tab to configure how many archives to keep and the location in which to store them. The default keeps *three* backups inside your **Current Archive Folder**, which is typically located in your shared **Textbook Tracker Support** folder. Clicking on the **Current Archive Folder** link will open the directory where all your archived data is stored.

Getting Started:

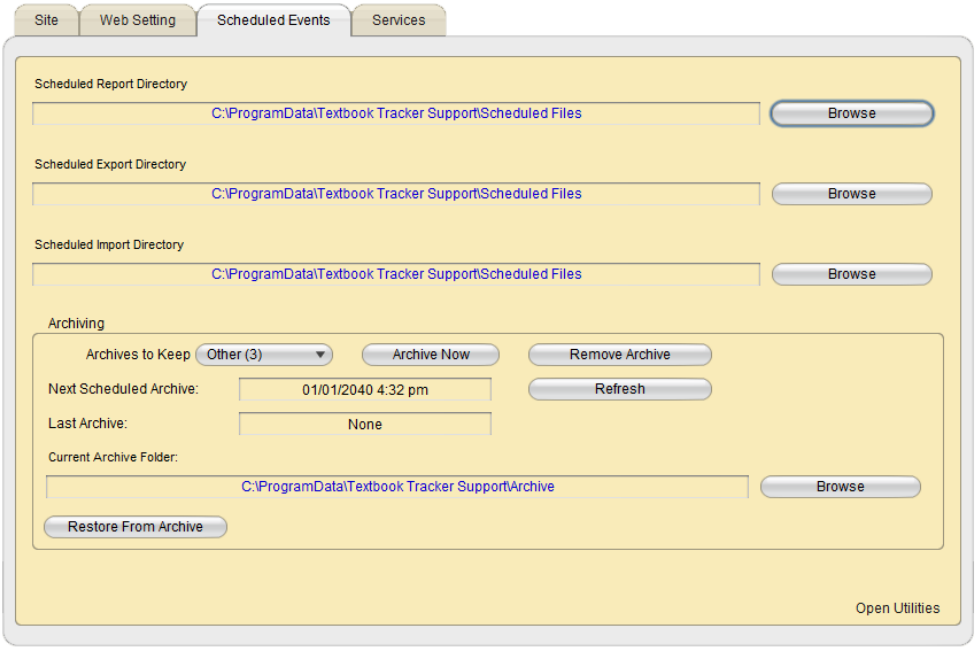
Step 1. Go to **Edit** on the main system menu bar and select **System Preferences (Cmnd/Ctrl+L)**.

Step 2. Click on the **Site Information** icon in the **System Administration** section of the **System Preferences** window.

Step 3. Set the **Archives to Keep** to **10** (suggested, if space is available).

Step 4. Change your **Current Archive Folder** if necessary (not suggested).

Step 5. Click on **Save** in the upper-right corner of the window.

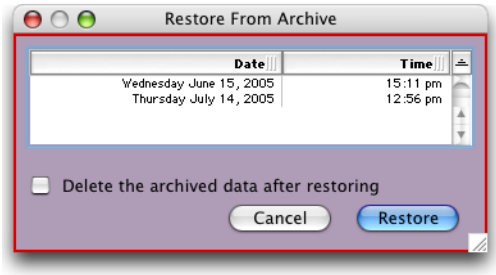


- NOTE -

If you have multiple Data Stations, setting your **Scheduled Events** preferences will have to be done for all schools by a Central Administrator operator that has the rights to Textbook Tracker Controller and/or Central Union.

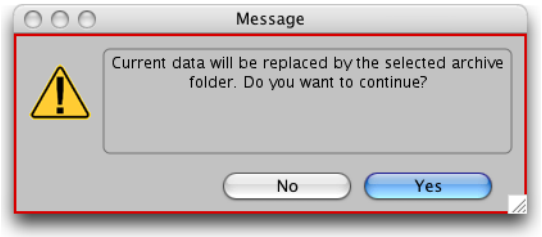
Restore From Archive

If you would like to restore your data from a previously created archive, click on the **Restore From Archive**[1] button. The **Restore From Archive** window will appear.



Select (highlight) the archive that you'd like to restore from; data archives are listed in oldest-to-newest order.

Once you have selected the correct archive to restore, click the **Restore** button. Your current data will be replaced by the selected archive folder. A warning window will appear, asking if you're positive that you would like to continue. Click **Yes** to continue or **No** to cancel.



You may also check the **Delete the archived data after restoring** box if you would like to remove the selected archive from your archive folder upon successful restoration.

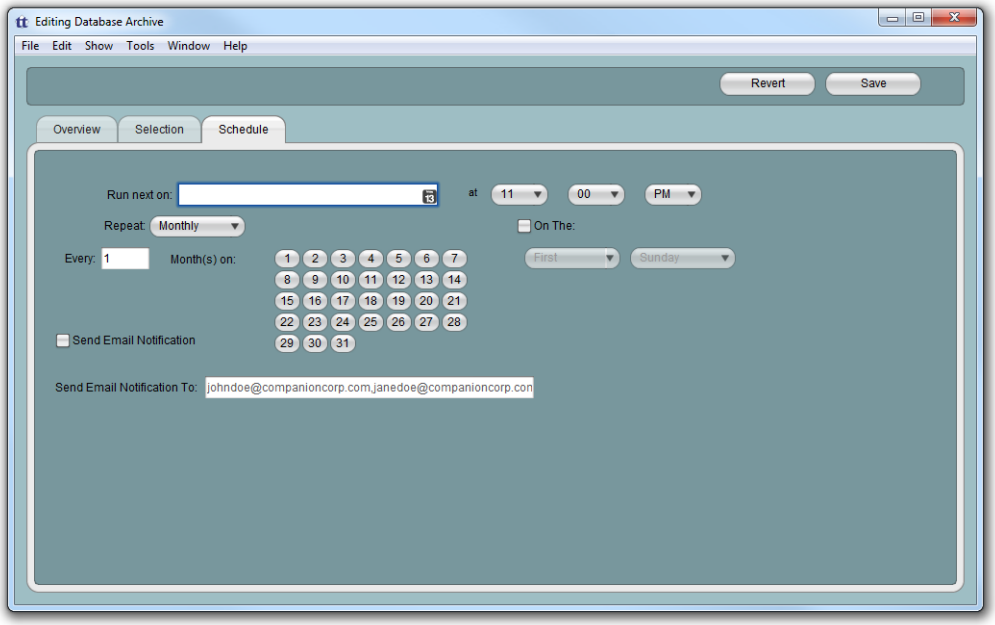
1.Clicking the **Archive Now** or **Restore From Archive** buttons can initiate the **Remote Control** window *(see "Remote Control" on page 445)*.

NOTE:
Archives are not a backup! Keeping an offsite backup is highly recommended.

Archives come in handy when trying to fix a bad import, but are entirely useless in the event of a system crash.

Archive Utility

The **Archive Utility** allows you to schedule automatic backup copies of your valuable Textbook Tracker Data.



When it's time for an archive, all information in the **Data** folder is copied the **Current Archive Folder** you have set in the **Scheduled Events** tab *(see page 56)*. During archiving, all services on the Data Station are disabled and if any clients are connected, the **Remote Control** window will appear *(see "Remote Control" on page 445)*.

Although you don't have to configure the automatic archiving function, it is *not* recommended. Your most recent archives (combined with your off-site backup) are invaluable in securing the safety of your school data *(see page 4 for more information)*.

- NOTE -

The Data Station must be turned on and running when you have the archive scheduled to take place. Thus, if the administrator doesn't want to leave their computers running overnight, they should change the default time(s) that the program is set to archive.

Send Email Notification—Textbook Tracker has the ability to send email notification to users when a scheduled archive has completed it's work. Supply the appropriate email addressees in the field below to enable email notification.

Send Email Notification To—Enter the email addresses of those who should be informed when an archive operation finishes. Multiple addresses should be separated by commas.

Getting Started:

Step 1. Go to **Tools** on the system menu bar and select **Utilities**.

Step 2. Select the **Database** tab in the upper-right corner of the window.

Step 3. Click the **Utilities** subtab.

Step 4. Select (highlight) **Archive** from the utilities field.

Step 5. Click the **Edit** button in the lower-right corner of the **Archive** section.

Step 6. On the **Schedule** tab of the **Edit Utility** window, enter a date into the **Run next on** field.

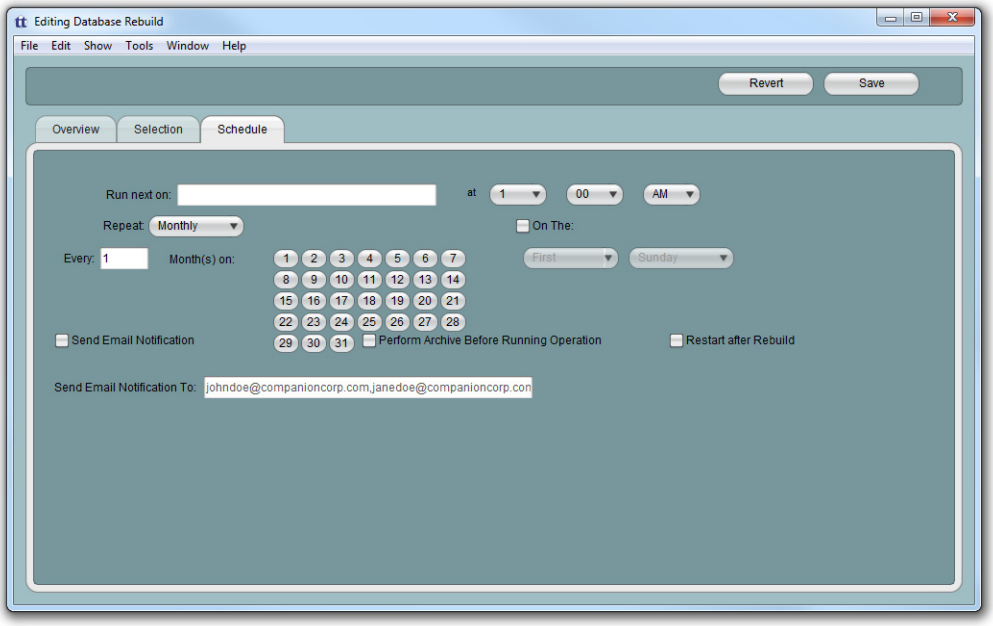
Step 7. Select how often to repeat the archive using the **Repeat** drop-down menu. You can choose **Never**, **Daily**, **Weekly**, **Monthly**, or **Yearly**. Click on each of those days, weeks, months, or years so that they appear selected or use the **On The** checkbox and corresponding drop-down menus.

Step 8. Set the **Hours** (**11 00 PM** is suggested) to whatever time you would like to run the archive. It should be done late at night when people are not normally accessing your catalog; this way, it doesn't appear that your catalog is frozen—Textbook Tracker cannot perform searches or circulation activities during an **Archive**.

Step 9. Click on **Save** in the upper-right corner of the window.

Rebuild Utility

The **Rebuild Utility** allows you to schedule automatic rebuilds of your Textbook Tracker Data.



Send Email Notification—Textbook Tracker has the ability to send email notification to users when a scheduled rebuild has completed it's work. Supply the appropriate email addressees in the field below to enable email notification.

Send Email Notification To—Enter the email addresses of those who should be informed when a rebuild operation finishes. Multiple addresses should be separated by commas.

Getting Started:

Step 1. Go to **Tools** on the system menu bar and select **Utilities**.

Step 2. Select the **Database** tab in the upper-right corner of the window.

Step 3. Click the **Utilities** subtab.

Step 4. Select (highlight) **Rebuild** from the utilities field.

Step 5. Click the **Edit** button in the lower-right corner of the **Rebuild** section.

Step 6. On the **Schedule** tab of the **Edit Utility** window, enter a date into the **Run next on** field.

Step 7. Select how often to repeat the rebuild using the **Repeat** drop-down menu. You can choose **Never**, **Daily**, **Weekly**, **Monthly**, or **Yearly**. Click on each of those days, weeks, months, or years so that they appear selected or use the **On The** checkbox and corresponding drop-down menus.

Step 8. Set the **Hours** (**11 30 PM** is suggested) to whatever time you would like to run the rebuild. It should be done late at night when people are not normally accessing your catalog; this way, it doesn't appear that your catalog is frozen—Textbook Tracker cannot perform searches or circulation activities during an **Rebuild**.

Step 9. Click on **Save** in the upper-right corner of the window.

Email Preferences

Getting Started:

Step 1. Go to **Edit** on the menu bar and select **System Preferences (Cmnd/Ctrl+L)**.

Step 2. Click on the **Email** icon in the **Network Services** section of the **System Preferences** window.

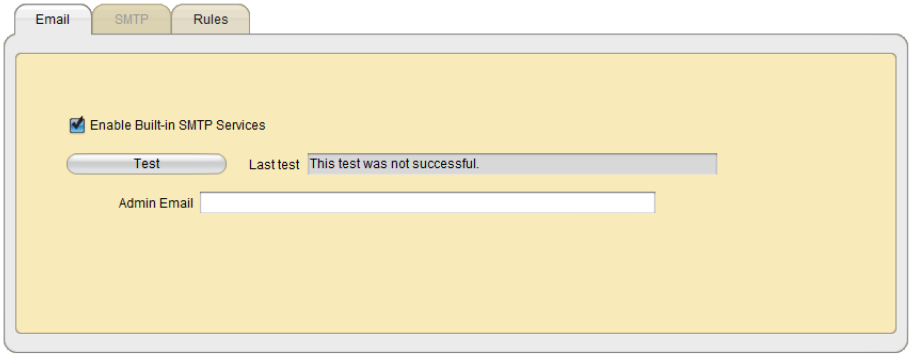
Step 3. To successfully use built-in or external SMTP, you must provide both a valid **Library Email Address** *(see "Site tab" on page 69 for more information)* and a valid **Email Address** for one of your Central Administrators *(see "Adding Operators" on page 113)*.

Step 4. Supply your **SMTP Server** information, **Port**, and, if **Use Authentication** is needed, check that box and provide your **Log In** and **Password**. Also check **Use SSL** if needed.

Step 5. Click **Save** in the upper-right corner of the window.

Email tab

Use the **Email** tab to determine whether Textbook Tracker should use a built-in or external mail service.



Enable Built-in SMTP Services—Check this box if you *do not* require an external SMTP server to be configured. Checking this box will make the **SMTP** tab inaccessible.

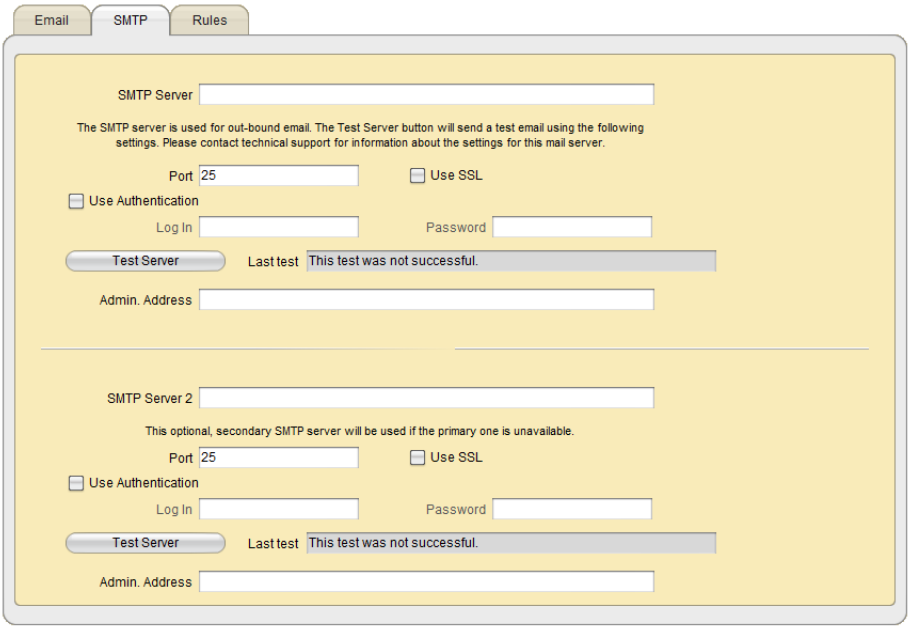
Test Server—Test the Textbook Tracker's SMTP settings by sending a test email.

Last Test—This field displays the last date/time that the test was performed and whether it was successful or not.

Administrator Address—Provide the email address of your Central Administrator here.

SMTP tab

Use the **SMTP** tab to configure how Textbook Tracker handles your site's mail server. The **SMTP** tab will *only* appear if you *don't* have the **Enable Built-in SMTP Services** box checked in the **Email** tab.



The **SMTP Server** and **SMTP Server 2** sections are used for out-bound email. The **Test Server** button will send a test email using your provided SMTP settings. Please contact COMPanion's Technical Support if you have additional questions about setting up your mail server.

SMTP Server 1 and **2**—This is the TCP/IP or DNS address of your site's mail server. Typically, this will be "`mail.`" followed by your domain name. You must enter a valid **SMTP Server** address to use email services.

Port—Supply the port number that your email server uses.

Use SSL—Check this box to use **S**ecure **S**ockets **L**ayer security protocols.

Use Authentication—Check this box to use authentication with this SMTP server. Checking this box will make the **Log In** and **Password** fields editable.

Log In—Enter the login (user identification) for the email server.

Password—Enter the password for the email server.

Test Server—Test the **SMTP Server** settings by sending a test email.

Last Test—This field displays the last date/time that the server test was performed and whether the test was successful or not.

Administrator Address—Provide the email address of your Central Administrator here.

SIP2 Preferences

> **- NOTE -**
>
> **SIP2** and **Checkpoint ILS** are an optional feature of Textbook Tracker. You must have purchased a subscription license to use these features. When you have licensed use of these features, a **SIP2** icon will become available in the **Circulation** section of your **System Preferences**.

SIP2 allows you to utilize SIP2 hardware (e.g. Checkpoint, 3M, etc.) by supporting the SIP2 protocol, making your site more efficient with enhanced inventory and security features. Empower your students with self-service check-in and -out modes, allowing you more time to focus on patron information needs.

Getting Started:

You will only need to provide information for these preferences if your school has SIP2 and you have purchased the SIP2 module for Textbook Tracker.

Step 1. Go to **Edit** on the main menu bar and select **System Preferences (Cmnd/Ctrl+L)**.

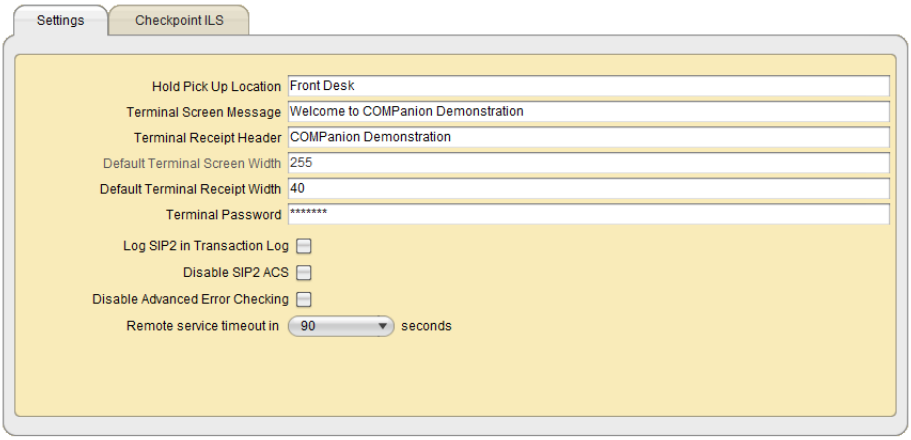
Step 2. Click on the **SIP2** icon in the **Circulation** section of the **System Preferences** window.

Step 3. Provide the required information for **SIP2** and **Checkpoint ILS** tabs.

Step 4. Click **Save** in the upper-right corner of the window.

Settings tab

The options in this window deal with miscellaneous SIP2 functions.



Hold Pick Up Location—This is posted to SIP2 machines when a hold is available and is the location where patrons can retrieve available items.

Terminal Screen Message—This is the welcome message that appears on self-service SIP2 terminals when a patron logs in. Default is the site name.

Terminal Receipt Header—This appears at the top of printed SIP2 receipts when a patron has completed a hold or checkout. Default is the site name.

Default Terminal Screen Width—The number of characters that are able to be displayed on a single line on the SIP2 hardware. Operators should refer to their SIP2 hardware's documentation for this number. This field is enabled and set to 255 characters when users have indicated that they are using **Checkpoint** hardware.

Default Terminal Receipt Width—The number of characters able to be printed on receipts given by the SIP2 hardware. Operators should refer to their SIP2 hardware's documentation for this number. Default is `40`.

Terminal Password—This field is required for the SIP2 machine to validate itself to Textbook Tracker. By default, the terminal password is your Textbook Tracker serial number.

Log SIP2 in Transaction Log—When checked, all transactions on SIP2 machines are logged to the transaction log of the Textbook Tracker Data Station. All SIP2 transactions are logged to the log file whether this box is checked or not.

Disable SIP2 ACS—Checking this box will disable Textbook Tracker's Standard Interchange Protocol's Automated Circulation System.

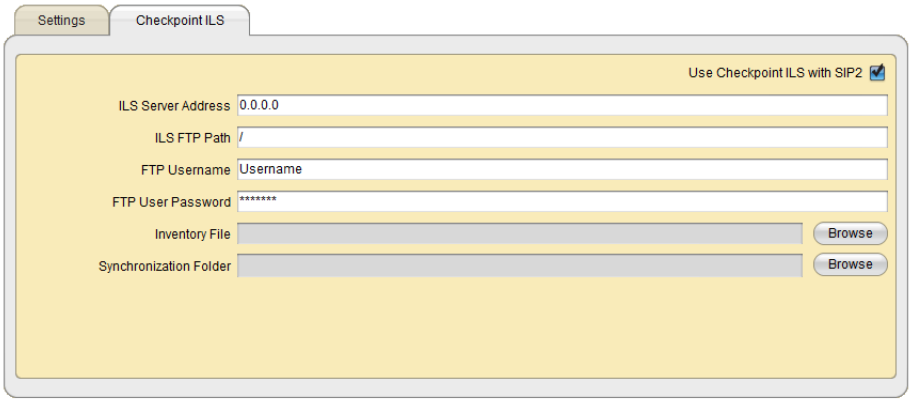
Disable Advanced Error Checking—This should only be checked if the SIP2 hardware doesn't use checksum validation. Enabling this when unnecessary will cause Textbook Tracker not to work with the SIP2 hardware.

Remote service timeout in ?? seconds—Choose the timeout for the remote service. Note that if "`0`" seconds are chosen, the remote service progress window of multiple users will not offer `\cancel\` and `\use current time\` options.

Checkpoint ILS tab

Checkpoint's ILS (Intelligent Library System) enhances the SIP2 protocol and should only be enabled if Checkpoint's SIP2 hardware is in use (SIP2 hardware is not interchangeable between manufacturers).

Make sure all **SIP2** settings are correct and that you have an FTP server running on the same machine as your Textbook Tracker Data Station. The ILS server will place an inventory file on your Data Station. If you are not running an FTP server on your Data Station, the inventory file will need to be placed manually.



Use Checkpoint ILS with SIP2—This box should only be enabled if Checkpoint's SIP2 hardware is in use.

ILS Server Address—This is the web address of the ILS FTP server you'd like to connect with. An FTP address looks a lot like an HTTP (website) or IP address, except it uses the prefix `ftp://` instead of `http://` and can be any combination of letters and numbers.

ILS FTP Path—This is the directory path (on the ILS FTP server) where Textbook Tracker will send its data. Having the wrong FTP path is one of the most common connection errors. If you get an error message when trying to connect, be sure to check your FTP path. Default is "**/**".

FTP Username—The login user name used to access the ILS FTP server.

FTP User Password—The login password used to access the ILS FTP server.

Inventory File—The directory that the ILS server places the inventory file it creates. If the ILS server has not yet created an inventory file, an empty file (of the same name and path) should be created and Textbook Tracker then directed to it using the **Browse** button.

Synchronization Folder—As part of the Checkpoint ILS system Textbook Tracker creates a "synchronization file" that contains a list of barcodes for each item that is currently outside of the school (checked out). This "synchronization file" (named `co_cache.txt`) is placed inside the synchronization folder that is user-specified in this field.

SIP2 / Checkpoint ILS Notes:

Terminology Preferences

The **Terminology System Preferences** allows those who use Textbook Tracker outside of the United States to have complete customization over their local vocabulary and currency standards. Changes made in these preference tabs will take effect immediately.

Getting Started:

You should only need to use the **Currency** and **Dates** preferences if you are in a country outside the United States. However, operators from *any* country may use the **Patron** and **Item** tabs to adapt terminology to suit their local needs.

Step 1. Go to **Edit** on the main menu bar and select **System Preferences (Cmnd/Ctrl+L)**.

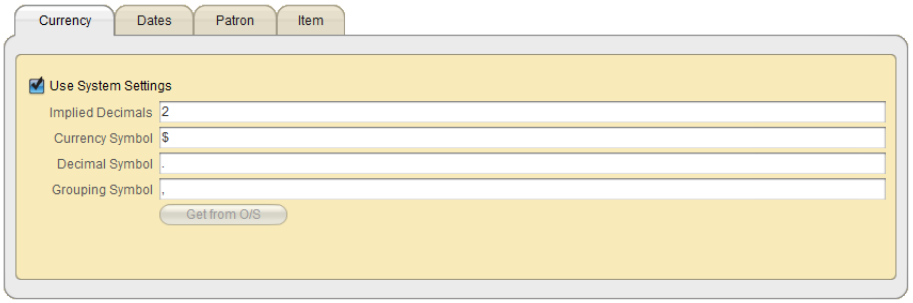
Step 2. Click on the **Terminology** icon in the **System Administration** section of the **System Preferences** window.

Step 3. Provide the required preference information in the **Currency**, **Dates**, **Patron**, and **Item** tabs.

Step 4. Click on **Save** in the upper-right corner of the window.

Currency tab

The **Currency** tab allows you to customize currency standards for use in Textbook Tracker.



Use System Settings—If checked, local currency standards will be automatically imported (and implemented) from the Data Station's operating system. These standards will be displayed in the **Currency** fields and appear uneditable. However, if this box is unchecked, you may edit the currency settings manually. Keep in mind that this will *only* change your Textbook Tracker currency standards, it will not affect your operating system settings.

Implied Decimals—This value, which *must* be between `0` and `4`, determines how many *implied* decimals (numbers after the decimal point) are used for your local currency standards. For example, `2` is the correct value for United States currency.

Currency Symbol—Currently, only a single-character currency symbol is supported (e.g. as in "`$`" for United States currency).

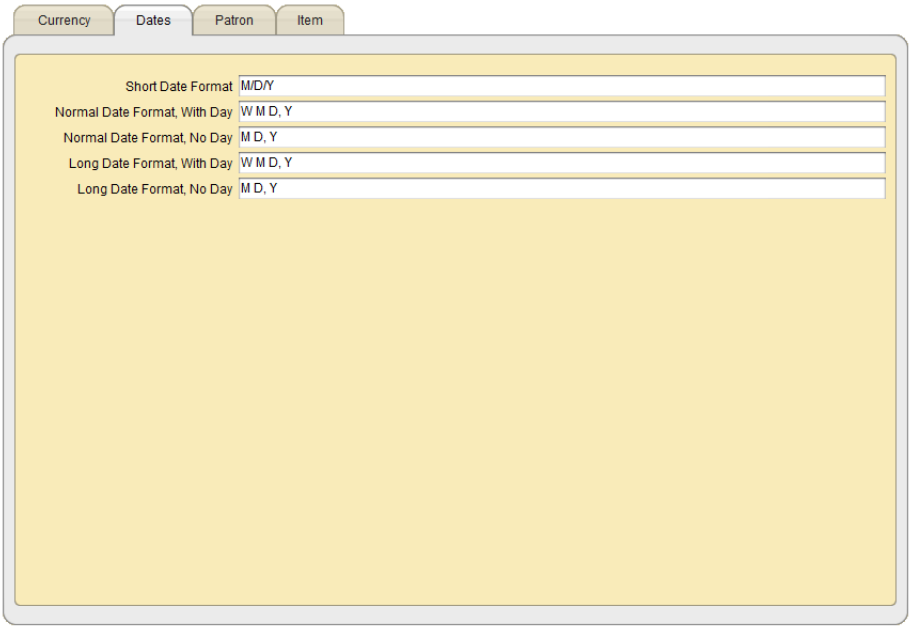
Decimal Symbol—Specify the symbol used as the decimal point (e.g. as in "`.`" for United States currency).

Grouping Symbol—Specify the symbol used as the grouping separator (e.g. as in "`,`" for thousands in United States currency). Currently, only 3-digit groupings are supported.

Get from O/S—Pressing this button will automatically import localized currency settings from your Data Station's operating system.

Dates tab

The **Dates** tab allows you to customize date formats for use in Textbook Tracker.



Short Date Format—The short date format would typically be set as '`M/D/Y`' if you want month first, providing output like `3/14/07`, or '`D/M/Y`' to put the day first, as in `14/3/07`. Remember, date input will be parsed according to this format and the date separator will be set based on the separator used here. Default is `M/D/Y`.

Normal Date Format, With Day—The normal date format, with day, will typically be set as '`W M D, Y`' if you want the month first, providing output like `Wed. Mar 13, 2007`, or '`W D M, Y`' to put the day first, as in `Wed. 14 Mar, 2007`. Default is `W M D, Y`.

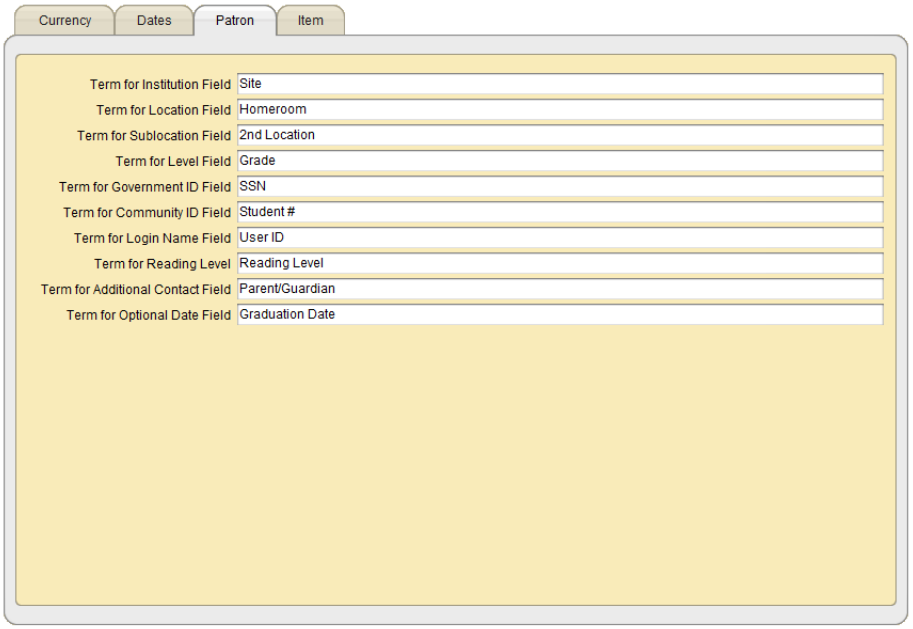
Normal Date Format, No Day—The normal date format, no day, will typically be set '`M D, Y`' if you want the month first, providing output like `Mar 14, 2007`, or '`D, M, Y`' to put the day first, as in `14 Mar, 2007`. Default is `M D, Y`.

Long Date Format, With Day—The long date format, with day, will typically be set as '`W M D, Y`' if you want the month first, providing output like `Wednesday, March 14, 2007`, or '`W D M, Y`' to put the day first, as in `Wednesday 14 March, 2007`. Default is `W M D, Y`.

Long Date Format, No Day—The long date format, no day, will typically be set as '`M D, Y`' if you want the month first, providing output like `March 14, 2007`, or '`D M, Y`' to put the day first, as in`14 March, 2007`. Default is `M D, Y`.

Patron tab

Use this tab to customize terminology for various patron-related fields within Textbook Tracker, including those in the **Patron Management** window. Long terms may be cut off in various areas of the program; it is better to keep them short and succinct.



Term for Institution Field—This preference lets you configure the term used for the **Institution** field. For example "`School`" instead of "`Institution`" or "`Site`".

Term for Location Field—This preference lets you configure the term used for the **Location** field. For example, you may want to use the term "`Homeroom`" rather than "`Location`."

Although you can change this term, *this guide* will refer to it as "`Location`."

For schools, this defaults to "`Homeroom`"; for other sites, this defaults to "`Location`."

If numeric ranges are going to be used in this field, they need to be padded with zeros in order to be sorted and selected correctly. For example, instead of a "`1`", "`2`", "`402`", you'd insert "`001`", "`027`", "`402`". Basically, in order to sort properly, *all entries with a numeric range need to have the same number of characters*.

Term for Sublocation Field—This preference lets you configure the term used for the Sublocation field.

You can use this field for whatever extra information you may need to enter. For example, you may want to use the term "`Last Period`" to identify an alternate location below the primary **Location** field. The term you choose will appear wherever Textbook Tracker uses the **Sublocation** term. If your school, site, or institution doesn't use the reading level terminology, this field can be used for other info such as AUP (acceptable use policy) status.

Although you can change this term, *this guide* will refer to it as "`Sublocation`." Default value is "`2nd Location`."

Term for Level Field—This preference lets you configure the term used for the **Level** field. For example, you may want to use the term "`Grade`" rather than "`Level`."

For schools, this defaults to "`Grade`." For other sites, this defaults to "`Level`."

Term for Government ID—This field is used for national ID numbers. In the United States, this is typically the Social Security Number. Default value is "`SSN`."

Term for Community ID—This field is used for community or local ID purposes. For schools, this defaults to "`Student #`"; for other sites, this defaults to "`ID #`."

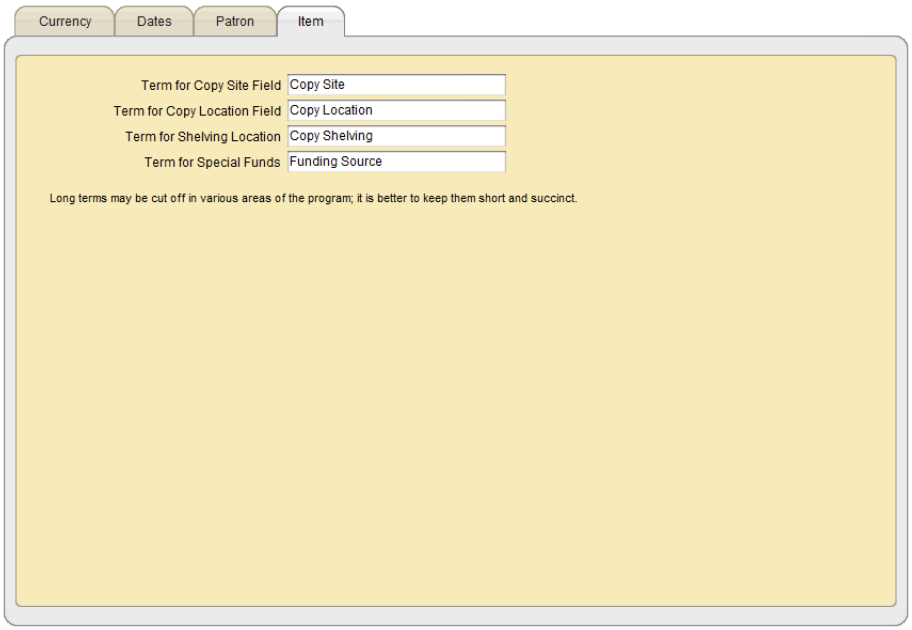
Term for Login Name Field—This field changes the terminology anywhere that a user identification number is required. Generally, this is simply "`Login`" or "`User ID`".

Term for Additional Contact—This field is used to change the terminology for emergency or secondary contacts. Default is "`Parent/Guardian`".

Term for Optional Date Field—If you would like to change the terminology for the optional date field, supply it here. Default is "`Graduation Date`".

Item tab

This preference allows you customize item-related terms for use within Textbook Tracker, including those found in the **Items** management window. Long terms may be cut off in various areas of the program; it is better to keep them short and succinct.



Term for Copy Site Field—This preference lets you configure the term used for **Copy Site**—for example, "`Copy Site`".

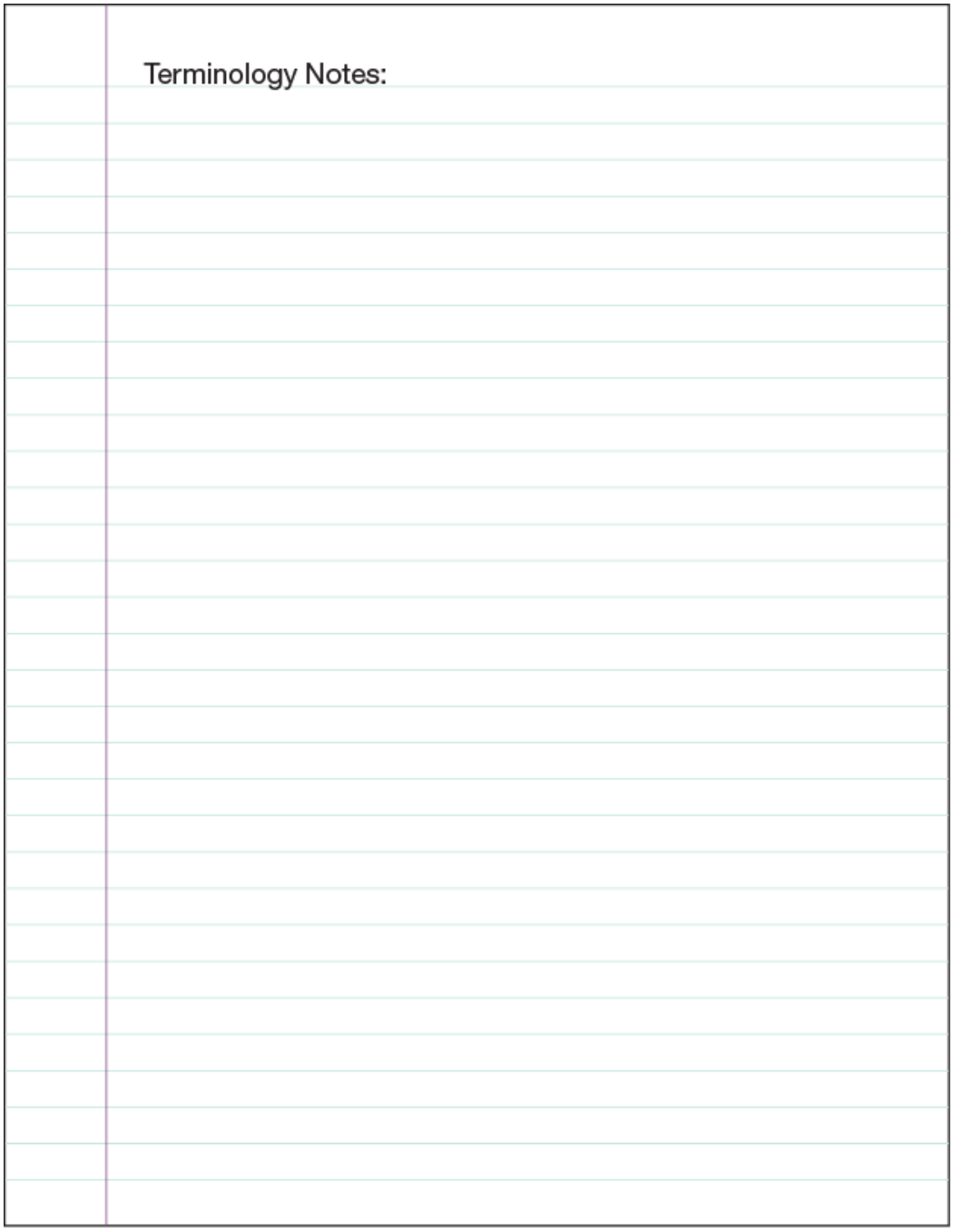
Term for Copy Location Field—This preference lets you configure the term used for the **Copy Location** field. For example, you may want to use the term "`Collection`" or "`Library Floor`" (for a multi-leveled library) rather than "`Copy Location`."

Although you can change this term, *this guide* will refer to it as "`Copy Location`."

If numeric ranges are going to be used in this field, they need to be padded with zeros in order to be sorted and selected correctly. For example, instead of a "`1`", "`2`", "`402`", you'd insert "`001`", "`027`", "`402`". Basically, in order to sort properly, *all entries with a numeric range need to have the same number of characters*.

Term for Shelving Location—Input the terminology you'd like to use for **Shelving**, an alternative location field that goes into the **852_c** tag.

Term for Special Funds—This field allows you to customize the term used for your special funds. Although you can change this term, *this guide* will use the generic term **Funding Source**. This field allows you to keep better track of where special funding for an item came from. For example, if you have to report the status of items purchased using government grants or special funds, enter the grant number or special fund name in this field. You can then generate reports using this field. Default setting is "`Funding Source`".


Terminology Notes:

Site Information Preferences

Getting Started:

Step 1. Go to **Edit** on the main menu bar and select **System Preferences (Cmnd/Ctrl+L)**.

Step 2. Click on the **Site Information** icon in the **System Administration** section of the **System Preferences** window.

Step 3. Provide the required **Library** tab information.

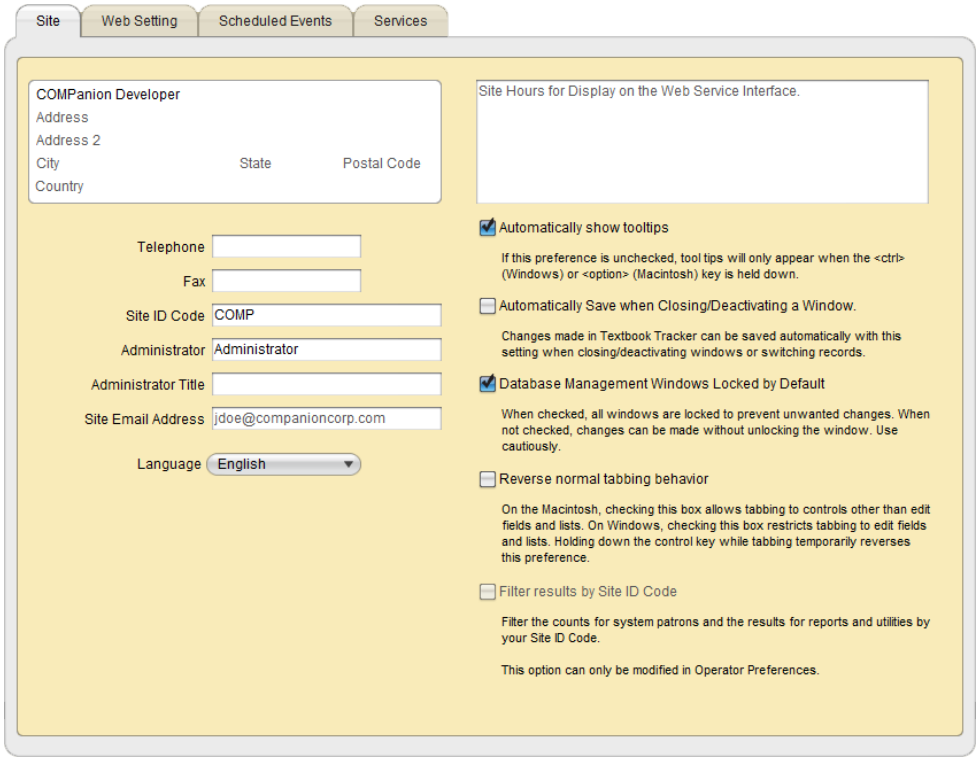
Step 4. Next, configure your **Web Settings** tab as desired; set the **Workstation Timeout** and check or uncheck the option to **Display log messages**. If you have a site license, this does not apply to you.

Step 5. After you have configured your **Site Information** preferences, click on **Save** in the upper-right corner of the window.

Site tab

Enter the name of your site. The default is your site license name. You must enter your address, city, state, postal code, country, telephone and fax; this data is used for return addresses on patron notices, for information shown on Workstation, and is included in emails sent to COMPanion's Technical Support team.

This address information will also be used as defaults when creating a new patron if no city, state, postal code, or country information is specified.


Site
Web Setting
Scheduled Events
Services
COMPanion Developer
Address
Address 2
City
State
Postal Code
Country
Site Hours for Display on the Web Service Interface.
Telephone
Fax
Site ID Code
COMP
Administrator
Administrator
Administrator Title
Site Email Address
jdoe@companioncorp.com
Language
English
Automatically show tooltips
If this preference is unchecked, tool tips will only appear when the <ctrl> (Windows) or <option> (Macintosh) key is held down.
Automatically Save when Closing/Deactivating a Window.
Changes made in Textbook Tracker can be saved automatically with this setting when closing/deactivating windows or switching records.
Database Management Windows Locked by Default
When checked, all windows are locked to prevent unwanted changes. When not checked, changes can be made without unlocking the window. Use cautiously.
Reverse normal tabbing behavior
On the Macintosh, checking this box allows tabbing to controls other than edit fields and lists. On Windows, checking this box restricts tabbing to edit fields and lists. Holding down the control key while tabbing temporarily reverses this preference.
Filter results by Site ID Code
Filter the counts for system patrons and the results for reports and utilities by your Site ID Code.
This option can only be modified in Operator Preferences.

Site Notes

Any text you enter in this field will be displayed when you click on the **Site Information** link in your Workstation. If you decide to leave this field blank, the text **Site Notes Not Specified** will appear in the **Site Information** section.

Information Section

Site ID Code—This is the site location identification code. This is a short code that is used for the MARC location code at **852_a** in the **Copy Collection** field. The default is the first four characters of your site name. If you change this value, all matching copy records are automatically updated to the new value. This preference is *absolutely critical* to **Central Union** circulation; therefore, the **Institution**/**Site** fields in the **Personal Info** tab of the **Patrons** management window and the **Copy Info** subtab (of the **Copy Information** tab) of the **Items** management window *must* exactly match or there may be problems.

Library—This is the name that appears at the bottom of form letters. Enter your head operator's name here.

Librarian Title—The administrator's title. For example, "Librarian", "Director of Media" or "Library Specialist"; this title can also be included on form letters. Default is **Librarian**.

Library Email Address—This is the school's email address, which is used as the return mail address for overdue notices and other email messages sent by Textbook Tracker. To guarantee that your email notifications are being sent, please check the list of requirements located under your **Email** preferences on page 57. You must enter a valid email address to use most email services, including COMPanion's Technical Support services.

Language—Select a default language from the list of available languages. Default is **English** unless otherwise set by activation codes[1].

Currently, Textbook Tracker only supports the English and Spanish language.

Automatically Show Tool Tips—If this preference is unchecked, Textbook Tracker's tool tips (those short pieces of descriptive text that appear when you hover your mouse cursor over buttons) will only appear when the <Ctrl> (Windows) or <Option> (Macintosh) key is held down.

Automatically Save when Closing/Deactivating a Window—When this box is checked, changes made in Textbook Tracker can be saved automatically when closing/deactivating windows or switching records. Default is OFF.

Database Management Windows Locked by Default—When this box is checked, all windows are locked to prevent unwanted changes. When not checked, changes can be made without unlocking the window. Use this option cautiously; default is ON.

Reverse Normal Tabbing Behavior—On the Macintosh, if this box is not checked, it will allow users to <tab> through all of a given window's tabs quickly without having to also tab through all the drop-down menus and editable fields contained within that window.

If this box is checked (on the Macintosh), then <tabs> will scroll through *every* drop-down window and editable field contained within that window.

On Windows, the above checkbox order is completely reversed.

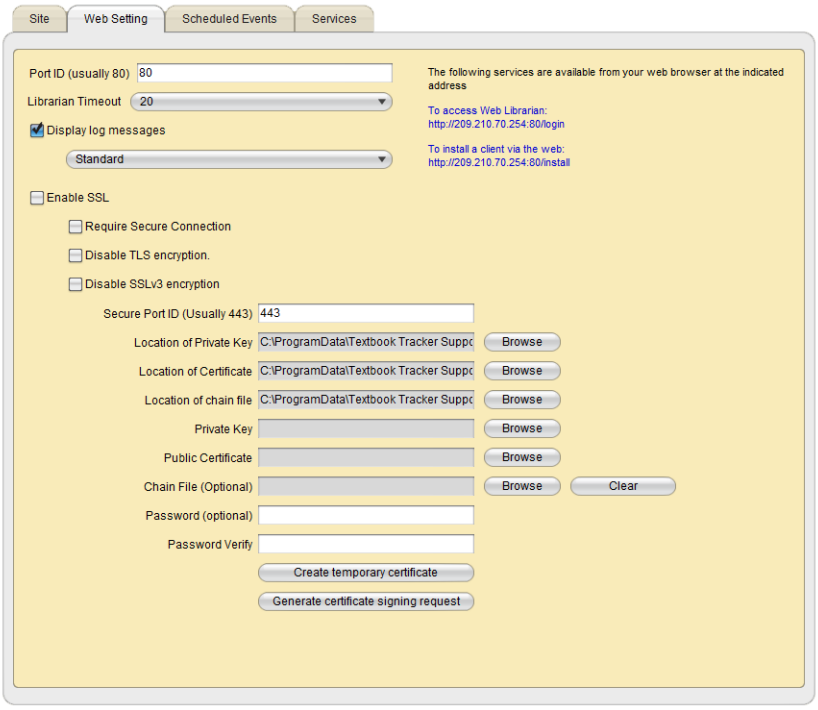
Holding down <Ctrl> while tabbing will temporarily reverse this preference (i.e. the tab order).

Filter results by Library ID Code—Filter the counts for system patrons and the results for reports and utilities by your **Library ID Code**.

1.The default language preferences is initially set by your Textbook Tracker registration information.

Web Setting tab

If you have licensed use of Workstations for your operators and patrons, these preferences are available to help setup your site's web interface.



Port ID (usually 80)—Sets the port number used for web interface (this is usually 80).

Web Workstation Timeout—This drop-down menu allows you to set how many minutes the Web Workstation can remain idle before logging out the current user. Default is **20**.

Display Log Messages—Log all remote commands (from Web Workstation) into the main Data Station's **Circulation** window—just as commands that are typed into the command line are logged. If left unchecked, results of commands will be logged in the log file *only*.

This checkbox will is only available if you have licensed use of Textbook Tracker's Web Workstation.

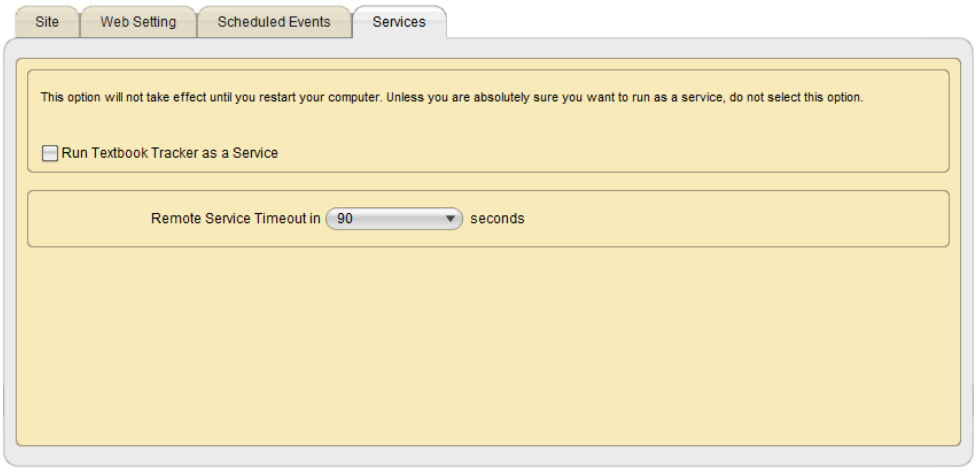
Quick Links

If licensed, these services will be available in a web browser using the indicated `HTTP` addresses. Alternately, you can click on the addresses themselves—they act as hyperlinks—taking you immediately to the indicated address using your system's default web browser.

To access Web Workstation—Click on this quick link to launch the Web Workstation client in your default web browser *(for more information, please review the "Web Workstation" section of the Textbook Tracker Online Wiki)*.

To install a client via the web—Click on this quick link to launch the **Textbook Tracker Web Installer** in your default web browser *(see page 28 for more information)*. The provided `HTTP` address is what you should use on all of the machines for which you would like to install an Textbook Tracker Workstation.

Services tab (Windows only)


Site
Web Setting
Scheduled Events
Services
This option will not take effect until you restart your computer. Unless you are absolutely sure you want to run as a service, do not select this option.
Run Textbook Tracker as a Service
Remote Service Timeout in
90
seconds

Run Textbook Tracker as a Service—This option automatically launches Textbook Tracker and runs it in the background every time your computer is started. Users will be unable to access program menus or make changes to patrons or items while Textbook Tracker is running as a service. You will need to deactivate the service and then re-launch Textbook Tracker in order to access your school data. Running Textbook Tracker as a service does not take effect until you restart your computer. Unless you are *absolutely sure* you want Textbook Tracker to run as a service, *do not* select this option.

This option will only appear on **Windows 2000**, **NT**, **XP**, **Vista**, and **OSX 10.5** machines.

Calendar Preferences

Use the **Calendars** tab to create custom calendars for your school. Textbook Tracker includes a calendar for the current year, previous year, and three years in the future. You can assign a separate calendar to each patron or circulation policy. This lets you set up calendars for groups of patrons who may be operating on different school levels and/or schedules

Getting Started:

Step 1. Go to **Edit** on the main menu bar and select **System Preferences (Cmnd/Ctrl+L)**.

Step 2. Click on the **Calendars** icon in the **Circulation** section of the **System Preferences** window.

Step 3. To change the **Month/Year** of the current calendar, use the corresponding drop-down menus located near the top of the calendar field; alternately, you may click **Next** to go forward one month or **Previous** to go back a prior month. The **Current** button returns the calendar to the present month and year.

Step 4. To select an existing calendar, select one from the **Calendars** list on the left-hand side of the window.

Step 5. You can mark days on the calendar as **Period Due** and **Closed** dates by clicking on the actual day. The choices cycle from **Open** (nothing displayed), **Closed**, **Period Due**, and then back to **Open**.

Step 6. Work through the months of the year, marking the dates on which the school is closed (e.g. holidays). Item due dates are calculated so that they never fall on **Closed** dates (only on **Open** or **Period Due** dates). However, please note that there are some exceptions to **Closed** dates when using **Override Dates**. For instance, you can change your preferences to stop fines from accruing on closed days.

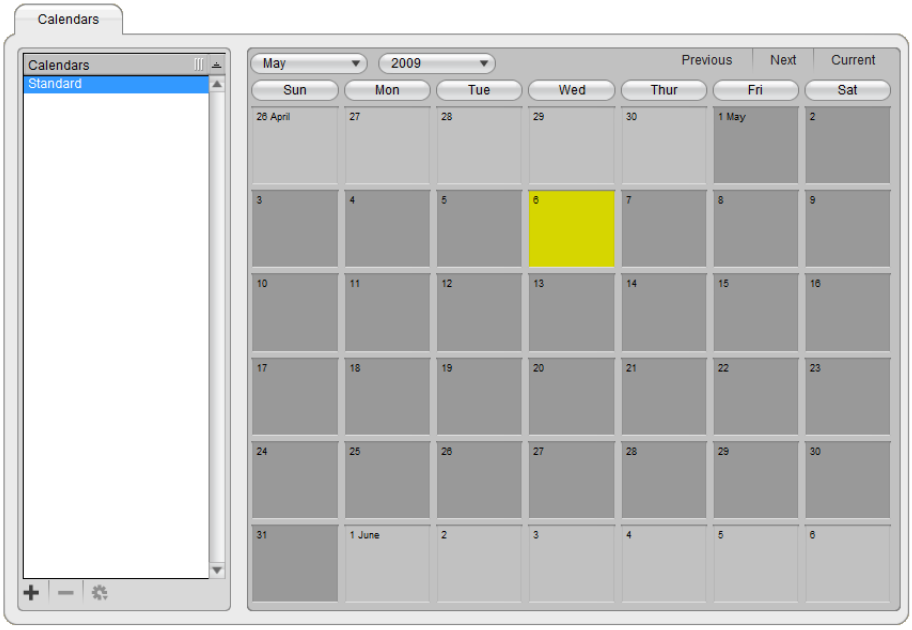
Step 7. To change the **Closed** date for the same day of the week for the entire selected month, click on one of the **Sun** through **Sat** buttons at the top of the calendar.

Step 8. To change the **Closed** date for the same day of the week for the entire year (for example, *every* Saturday), hold down the `<Alt>` (Windows) | `<Option>` (Macintosh) key and click on one of the **Sun** through **Sat** buttons at the top of the calendar.

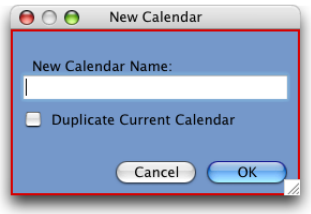
Step 9. Mark the date(s) that you want *all* materials to be returned to your site as **Period Due** (e.g. a particular date near the end of the school year). A **Period Due** date forces an item (on a particular calendar) to be due on *that* day; check your **Policies System Preferences** to **Apply Period Due Dates**. For example, if you set a period due date of September 30, 2012, all books checked out *before* September 30th (that normally would have had a due date *after* the 30th), will be assigned a new due date of September 30th.

Calendars tab

You can <shift-click> on a date to add a note. Notes can be used to display automatic reminders on Workstations, as well as provide private notes for operators and patrons. When you've created a note, an icon will appear on the calendar day. Alert notes are only active for the **Standard** calendar and are ignored on other calendars. **General Notes** are available for all calendars.



To add a new (or delete an existing) calendar:



Step 1. Click the **New** ("**+**") button; a **New Calendar** window will appear.

Step 2. Enter the **New Calendar** name in the blank field.

Step 3. If this new calendar is to be a duplicate of the current calendar (i.e. used as a template for a new one), check the **Duplicate Current Calendar** box.

Step 4. Click on **OK** to save the new calendar and make it current; alternately, click **Cancel** to abort the process.

Step 5. Click **Save** to keep your changes or **Revert** to cancel them

Step 6. To *delete* a calendar, make it the current calendar and click the **Remove** ("**—**") button. Any policies that were using the deleted calendar will be reassigned to the **Standard** calendar. You *cannot* delete the **Standard** calendar.

Policy Preferences

Using the Policies System Preferences

The **Policies** window is divided into two distinct sections that function independently of one another and allow you to create or customize the settings of a particular **Patron** or **Item** policy.

An operator can move through any of the tabs that line the top of the window (**Check Out**, **Overdue**, **Hold**, **Reservation**, and **Other**) at any time, no matter the current mode (i.e. **Standard** or **Exceptions**).

Standard Mode

Every patron *must* belong to a **Patron** policy; the rules of a particular **Patron** policy apply to *every* patron under that policy. An **Item** policy will be applied to every item in your collection; the rules of a particular **Item** policy apply to *every* item under that policy.

The settings of a particular **Patron** policy apply to *every* **Item** policy. For example, selecting **3rd Grade** as your **Patron** policy and changing the **Maximum number of items checked out** to 6 will limit *every* patron in the third grade to six items of *any* **Item** policy, whether it be **Fiction** or **Non-Fiction**.

Exceptions Mode

The way that policies interact in **Standard Mode** can be adjusted by clicking the **Exceptions** button to enter **Exceptions Mode**. This mode allows you to further customize your policy settings by modifying the relationship between a specific (selected) patron and item policy.

Exceptions can be made to every policy combination via the fields, drop-down menus, and checkboxes contained in the **Policies** tabs.

For example, if you usually allow your **4th Grade** patrons to check out five items at a time, but you only want them to be able to check out three music CDs, select the **4th Grade** (**Patron**) policy on the left and the **Music CDs** (**Item**) policy on the right, click the **Exceptions** button (it should turn red), and then change the **Max items of THIS TYPE checked out** to the number 3.

Any **Policies** tab that contains an exception will display an **Alert** icon to the left of the tab name. This indicates that an exception is present on *that* tab for the selected **Patron**/**Item** policy combination. If you click on this tab, you'll notice that the **Exceptions** button has turned yellow, indicating that an exception is present.

While in **Exceptions Mode**, a red focus box will appear around any field, drop-down menu, or checkbox in the **Policies** tabs (**Patron** or **Item**) that contains an exception, making it clear that the data shown in the field is an exception to the default setting.

To remove a particular **Exception**, select (highlight) the field, drop-down menu, or checkbox that contains the exception and select **Remove Selected Exception** from the relevant **Actions** menu. You may also select **Remove All Exceptions** from either **Actions** menu to remove all of the exceptions from both the selected patron and item policy.

Getting Started: Creating New Patron Policies

If you are convinced that more detailed **Patron** policies are the way to go, here are some steps to follow:

Step 1. Select **System Preferences (Cmnd/Ctrl+L)** from the main **Edit** menu bar.

Step 2. Click on the **Policies** icon in the **Circulation** section of the **System Preferences** window.

Step 3. Click the **Add** ("**+**") button in the lower-left hand side of the **Patron** policy section.

Step 4. Enter the new **Patron Policy Name** and **Patron Policy Short Code** and select an optional **Stat Group** in the fields provided.

Step 5. Make a selection from the **Defaults from** drop-down menu and then press `<enter>` or click **OK**; the new policy will take its defaults from whatever is selected from this drop-down menu.

Step 6. Next, tab through the various **Policies** (**Check Out**, **Overdue**, **Hold**, **Reservation**, and **Other**) providing appropriate values to the fields, drop-down menus, and checkboxes in order to create your policy.

Step 7. When you have completed your new policy, click the **Save** button.

Step 8. Repeat this process until you have made all your new patron policies.

- NOTE -

Using the **Restore From Defaults** selection from the **Actions** menu is independent from the current **Policy** mode. For instance, if you use **Restore From Defaults** while in **Exceptions Mode**, it will create exceptions for any value that has been modified.

Restoring defaults will revert the policy fields, drop-down menus, or checkboxes to the values that were provided when the policy was initially created.

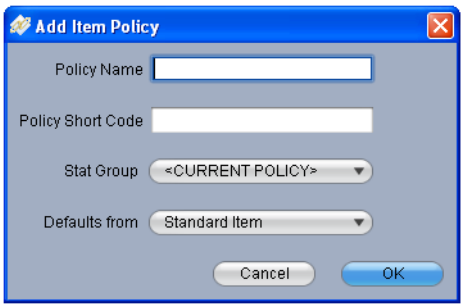
Getting Started: Creating New Item Policies

Now, following these steps, create your new **Item** policies:

Step 1. Select **System Preferences (Cmnd/Ctrl+L)** from the main **Edit** menu bar.

Step 2. Click on the **Policies** icon in the **Circulation** section of the **System Preferences** window.

Step 3. Click the **Add** ("**+**") button in the lower-left hand side of the **Item** policy section.



Step 4. Enter the new **Item Policy Name** and **Item Policy Short Code** and optional **Stat Group** in the fields provided.

Step 5. Make a selection from the **Defaults from** drop-down menu and then press `<enter>` or click **OK**; the new policy will take its defaults from whatever is selected from this drop-down menu.

Step 6. Next, tab through the various **Policies** (**Check Out**, **Overdue**, **Hold**, **Reservation**, and **Other**) providing appropriate values to the fields, drop-down menus, and checkboxes in order to create your policy.

Step 7. When you have completed your new policy, click on the **Save** button.

Step 8. Repeat this process until you have made all your new item policies.

- NOTE -

Many schools or public libraries create policies based on medium type or call number range. Textbook Tracker will not automatically change or set any item's policy just because a policy matches the medium type or call number range. The operator must set the item's policy either during an item import, running the **Utilities — Copies — Replace Information** or manually in the **Items** management window.

Getting Started: Creating an Exception

To create or modify a circulation policy:

Step 1. Select **System Preferences (Cmnd/Ctrl+L)** from the main **Edit** menu bar.

Step 2. Click on the **Policies** icon in the **Circulation** section of the **System Preferences** window.

Step 3. From the drop-down menu, select the **Patron Policy** that, when combined with an **Item Policy**, will create an exception.

Step 4. Next, from the drop-down menu, select the **Item Policy** that, when combined with your selected **Patron Policy**, will create an exception.

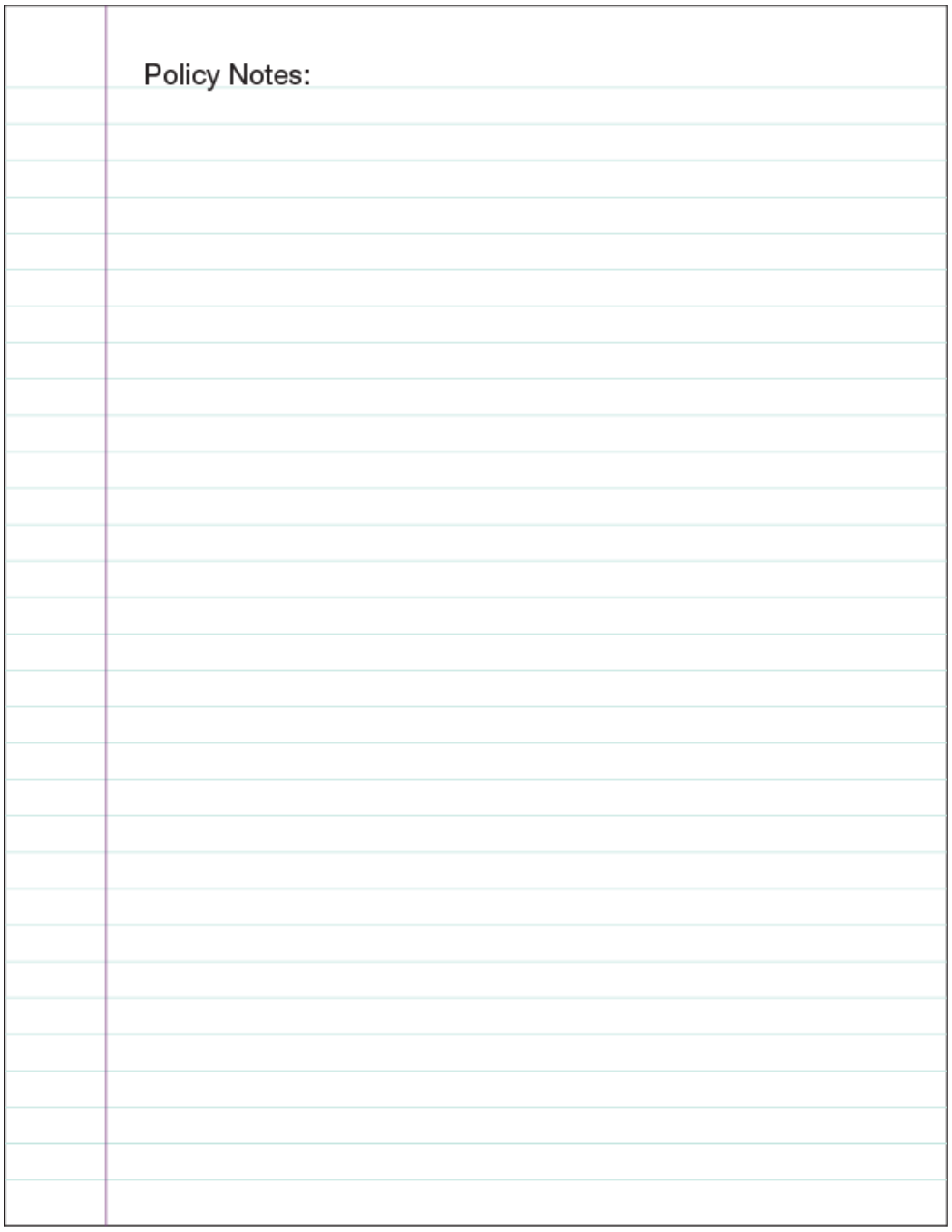
Step 5. Click the **Exceptions** button (it should turn red).

Step 6. Go through the various **Policies** tabs (**Check Out**, **Overdue**, **Hold**, **Reservation**, and **Other**), changing the appropriate values to the fields, drop-down menus, and checkboxes.

Step 7. When you have successfully created your exceptions, click the **Save** button.

- NOTE-

Changing a policy will *not* affect past transactions. The only two ways to change the fine rate on a book that is currently checked out is to check in the book, forgive the fine, and check out the book to the same patron for the old due date (using a manual override date) or to use the **Utilities — Circulation — Update** utility.


Policy Notes:

Rules Preferences

Getting Started:

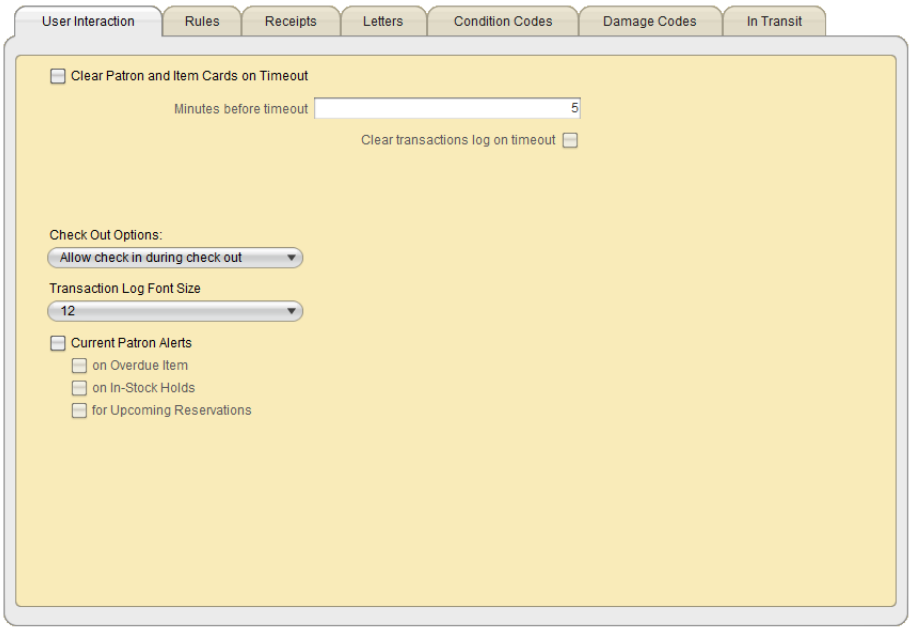
Step 1. Select **System Preferences (Cmnd/Ctrl+L)** from the main **Edit** menu bar.

Step 2. Click on the **Rules** icon in the **Circulation** section of the **System Preferences** window.

Step 3. Click on the **User Interaction** tab.

Step 4. The most important preference on this tab is the **Check Out Options**. COMPanion suggests that this be set to **Allow check in with confirmation during checkout**.

User Interaction tab



Clear Current Patron/Item on Timeout—When this box is checked, it will clear the current patron/item from the main **Circulation** window depending on what you have set in the **Minutes Before Timeout** field.

Minutes Before Timeout—This field will appear grayed out unless you have **Clear Current Patron/Item on Timeout** checked. Provide the amount of time (in minutes) to wait before Textbook Tracker clears the current patron/item from the main **Circulation** window.

Also Clear Transaction Log on Timeout—This checkbox will appear grayed out unless you have **Clear Current Patron/Item on Timeout** checked. When this box is checked, the **Transaction Log** will also be cleared when the current patron/item are cleared.

Check Out Options—This drop-down menu allows users to change the functionality of Textbook Tracker's **Check In/Out** mode. When **Allow check in with confirmation during check out** is selected, Textbook Tracker will not allow a book to be checked in during **Check In/Out** mode without user confirmation. When set to **Don't allow check in during check out**, Textbook Tracker won't allow any items to be checked in. However, this setting only applies when the current patron has already checked the item out and processing the same barcode would check it back in; it does *not* apply when another patron has the item checked out. Default is **Allow check in during check out**.

Allow check in during check out—If Textbook Tracker is in **Check Out** mode, this option allows items to be checked-in or bookdropped using the **Circulation** window.

Allow check in with confirmation during check out—If you try to check in an item (or items) while the **Circulation** window is in **Check Out** mode, Textbook Tracker will require verification (if you wish to check in or renew) before checking-in or renewing any items.

Don't allow check in during check out—This selection will not allow items to be checked in while Textbook Tracker's **Circulation** window is in the **Check Out** mode. For example, your site may require separate Workstations, some that only allow items to be checked in and others that only allow items to be checked out.

Transaction Log Font Size—Use this drop-down menu to set how large (or how small) you would like the text to appear in the **Circulation** window's **Transaction Log**. You may choose from **18**, **16**, **14**, **12**, or **10** point size. Default is **12**.

Current Patron Alerts—When this preference is checked, it will provide an alert when a patron is made current and has fines, overdue items, in-stock holds, upcoming reservations, or other special cases. Mark the boxes beneath this preference to indicate which events you would like to trigger an alert.

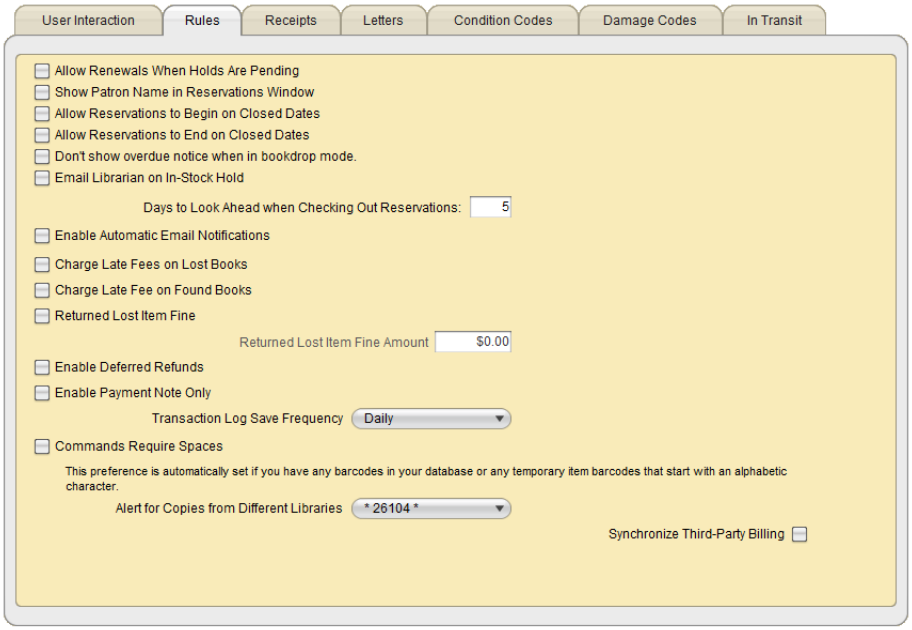
Getting Started:

Step 1. Click on the **Rules** tab; use this tab to set whether or not items may be renewed when there are holds are pending, whether or not to show the patron name in the reservations window and other reservations-connected preferences.

Step 2. Set whether or not to charge late fees on lost or found books, etc.

Step 3. Set the **Transaction Log Save** frequency (we recommend **Daily**).

Rules tab


User Interaction
Rules
Receipts
Letters
Condition Codes
Damage Codes
In Transit
Allow Renewals When Holds Are Pending
Show Patron Name in Reservations Window
Allow Reservations to Begin on Closed Dates
Allow Reservations to End on Closed Dates
Don't show overdue notice when in bookdrop mode.
Email Librarian on In-Stock Hold
Days to Look Ahead when Checking Out Reservations: 5
Enable Automatic Email Notifications
Charge Late Fees on Lost Books
Charge Late Fee on Found Books
Returned Lost Item Fine
Returned Lost Item Fine Amount $0.00
Enable Deferred Refunds
Enable Payment Note Only
Transaction Log Save Frequency Daily
Commands Require Spaces
This preference is automatically set if you have any barcodes in your database or any temporary item barcodes that start with an alphabetic character.
Alert for Copies from Different Libraries * 26104 *
Synchronize Third-Party Billing

Allow Renewals When Holds Are Pending—When checked, this option allows users to renew books that have hold requests pending. Default is unchecked.

Show Patron Name in Reservations Window—When unchecked, patron barcodes are displayed in the reservations window. When checked, the patron's last name is shown in the reservations window. Default is checked.

Allow Reservations to Begin on Closed Dates—When checked, this option allows users to place reservations that begin on closed school dates. Default is unchecked.

Allow Reservations to End on Closed Dates—When checked, this option allows users to place reservations that end on closed school dates. Default is unchecked.

Don't Show Overdue Notice When In Bookdrop Mode—When checked, a patron will be automatically fined when an overdue book is dropped.

Email Librarian on In-Stock Hold—When checked, Textbook Tracker will email operator(s) when an item status changes to **In-Stock Hold**.

Days to Look Ahead When Checking Out Reservations—This sets the number of calendar days that Textbook Tracker looks ahead for reservations when items are checked in. During check in, if a reservation is detected within this specified time period, Textbook Tracker displays a notice for the user. The "GG" and "GPP" circulation commands also take this date into account before checking reservation items out to patrons. Default is set to 5 days.

Enable Automatic Email Notifications—Check this box if you want Textbook Tracker to automatically send email confirmations and notices to patrons. If selected, Textbook Tracker will send email to patrons whom have a valid email address when the following events occur: a hold is placed, a hold expires, an in-stock hold is available, an in-stock hold expires, item becomes overdue, and a recall is issued.

To make this option available and to guarantee that your email notifications are being sent, you must have a valid **Library Email Address** *(page 69)*, a valid patron email address *(page 203)*, text in your **Overdue Notice** letter field *(page 87)*, and this **Enable Email Notifications** box checked. Default is OFF.

Days to Look Ahead for Reservation Notice—This sets the number of calendar days that Textbook Tracker looks ahead when sending out upcoming reservation email notices. Default is set to 4 days.

Charge Late Fees on Lost Books—If this option is ON, then late fees continue to accumulate on lost books up to the max fee limit that is set in that item's **Items** policy preference. To stop charging fees on a particular item, **Remove** the copy or assign it as **Discarded**. Default is OFF.

Charge Late Fees on Found Books—If this option is checked, when a lost item has been located, the patron who last had the book is charged an overdue fine for the period between when the item was lost and when it was found (up to the **Maximum fine for an overdue item**). When this box is checked, the **Refund Lost Item Payment, Charge Overdue Fine** window appears when a lost item with an overdue fine is found.

Returned Lost Item Fine—Fine to withhold when refunding the fine for a lost item that has been found.

Returned Lost Item Fine Amount—Amount of fine to withhold when refunding the fine for a lost item that has been found.

Enable Deferred Refunds—If this option is checked, when lost items are located, there will be an option in the dialog box to defer payment of the refund by creating a credit.

Enable Payment Note Only—If this option is checked, when a lost item is checked in and there is a payment due or refund due and the current Textbook Tracker operator does not have payment or refund permissions, they will be allowed to enter a note.

Transaction Log Save Frequency—Select **Daily**, **Weekly**, **Monthly** or **Never**. Archived logs are placed in the **Log** folder, which is located in Textbook Tracker's shared application support folder *(see page 4 for more information)*. Default is **Weekly**.

Any Workstation that connects to the main Data Station will also create a **Log** folder, where archived logs are saved. The transaction log will contain everything that is displayed in the **Circulation** window, and any additional special notes that may be useful. Every Textbook Tracker machine will keep a transaction log that contains a history of everything that has occurred. It can be a valuable document if you want to examine any Workstation's history.

The following choices are available:

Daily—The transaction log is archived at the beginning of each day and is placed in the **Log** folder with a name such as **Circ Log for day 20050120** (**yyyymmdd**).

Weekly—The transaction log is archived every week (a week starts on Monday) and is placed in the **Log** folder with a name such as **Circ Log for week 20050120** (**yyyymmdd**).

Monthly—The transaction log is archived at the beginning of every month and is placed in the **Log** folder with a name such as **Circ Log for month 200501** (**yyyymm**).

Never—The transaction log is saved, but never archived. Under this option, the transaction log can grow to be very large; this can cause difficulty when attempting to search for a specific transaction.

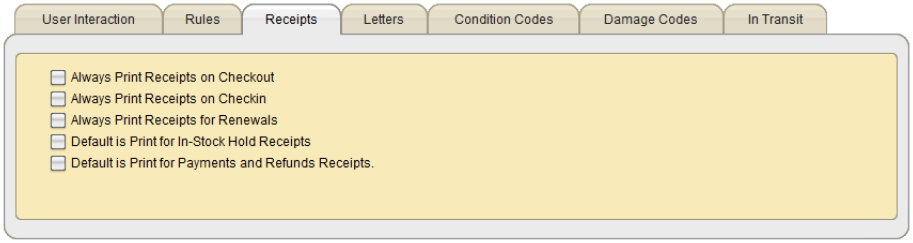
Commands Require Spaces—Checking this box will require that all Textbook Tracker **Circulation** window commands (or remote transaction import scripts) have spaces between the actual command and any additional command information. For example, if this box is checked, Textbook Tracker won't be able to recognize the command `F4.50` (a charge of four dollars and fifty cents). However, if you enter `F 4.50`, with a space between the `F` and the `4`, then Textbook Tracker will be able to process the command. This preference exists for schools who use barcodes that start with letters of the alphabet; that, in case they are imported, they are not misinterpreted as Textbook Tracker commands. This preference will be automatically set if you have any barcodes in your database or any temporary item barcodes that start with an alphabetic character.

Alert for Copies from Different Libraries—If checked, a warning message will appear when copies from different sites are checked in or inventoried.

Getting Started:

Step 1. Use this preference tab to configure when you want to have receipts automatically printed. Of course, you can always use the <D> command to print transaction receipts.

Receipts tab



Always Print Receipts on Check Out—When checked, Textbook Tracker will automatically print a receipt for every item that is checked out. This receipt contains information similar to that which is displayed when you click on the current item's **Details** button. When OFF, receipts can be printed manually using the <D> command in the **Circulation** window at the end of a transaction.

Always Print Receipts on Check In—When checked, Textbook Tracker will automatically print a receipt for every item that is checked in. This receipt contains information similar to that which is displayed when you click on the current item's **Details** button. When OFF, receipts can be printed manually using the <D> command in the **Circulation** window at the end of a transaction.

Always Print Receipts for Renewals—When checked, Textbook Tracker will automatically print a receipt for every item that is renewed. This receipt contains information similar to that which is displayed when you click on the current item's **Details** button. When OFF, receipts can be printed manually using the <D> command in the **Circulation** window at the end of a transaction.

Default is Print for In-Stock Hold Receipts—When checked, Textbook Tracker will automatically print a receipt when an item becomes an in-stock hold.

Default is Print for Payments and Refunds Receipts—When checked, Textbook Tracker will automatically print receipts for payments and refunds.

***Optional additional text for slip printer receipts—**This is a user-defined text header that appears before the general header (or after the patron name on in-stock hold receipts). This header will be centered horizontally and can be as many lines as are required by the user. This field is most often used to house the name and address of your school or site.

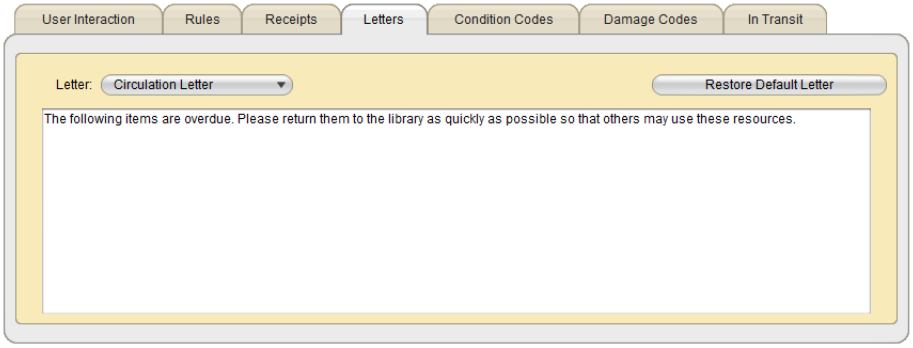
This is an optional feature of Textbook Tracker; you must be purchase a **Slip Printer** registration license in order for this preference to appear.

***Print this logo on slip printer receipts—**The slip printer uses thermal paper which can reproduce simple images clearly. For the best results, please select a very basic bi-color image for display on receipts. The logo must be in a PNG, BMP, JPG or GIF image format and, for optimal quality, have a dimension no larger than 200 pixels wide by 250 pixels high.

This is an optional feature of Textbook Tracker; you must be purchase a **Slip Printer** registration license in order for this preference to appear.

Getting Started:

Step 1. Use this tab to customize the body text of the letters (patron notices) sent from the school. This includes overdue notices, recall messages, etc.



Letters tab

Use the **Restore Default Letter** button to replace custom text with default text. If you use this button, located in the upper-right corner of the window, it will restore *all* of the default letters at once.

Circulation Letter—"The following items are overdue. Please return them to the school as quickly as possible so that others may use these resources."

In-Stock Hold—"An In-Stock item is being held for you. Please pick it up by the specified date or it will be returned to general circulation."

Recall—"The following item is required at the school. Please return it as quickly as possible."

Reservation Notice—"Please note that you have a reservation on the following items. Reserved items should be picked up in the morning of the reservation start date and returned by the evening of the due date."

Overdue Suspension Notice—"Your school privileges have been suspended because the following item has been overdue."

Patron Suspension Notice—"The school has suspended this account. Until the suspension is cleared, items cannot be checked out and holds and reservations cannot be placed. If you have any questions, please contact your school."

Account Access Information—"Here is your barcode, username, and password for accessing the school catalog. This information is necessary for accessing your patron status details which includes a list of items you have checked out and their due dates, holds and reservations you have placed and their expiration dates, and any charges you owe the school. You will need this information to place holds or reservations if you are allowed to do so. You may change your username and password using the Textbook Tracker application or using the Textbook Tracker Web Catalog."

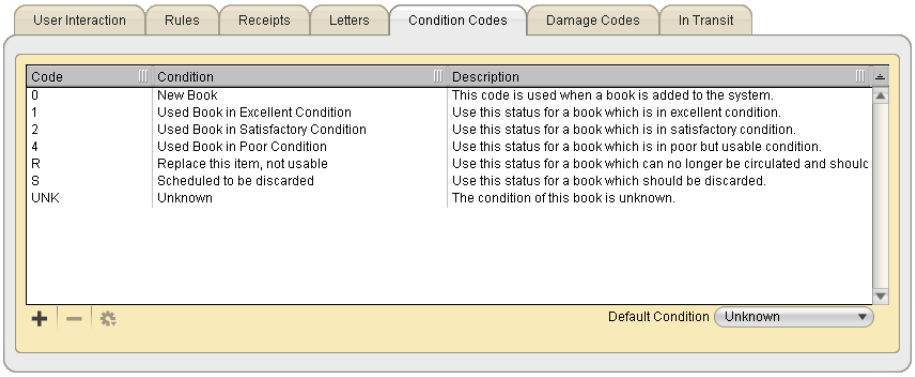
Email Signature—The default is left blank. Usually, this is the name, address, and phone number of the school or institution.

Circulation Notice—"The following items are overdue. Please return them to the school as quickly as possible so that others may use these resources.

Circulation Notice Email Subject—"Notice from your School."

Condition Codes tab

This tab allows users to select from a list of user-defined condition codes. After a condition code has been created, you can enter the **Set Condition** mode in the main Textbook Tracker **Circulation** window. When you are in this mode, every item barcode you input into the command line (or scan) will have the selected condition code applied. You may also use this command in conjunction with the "RR" command.

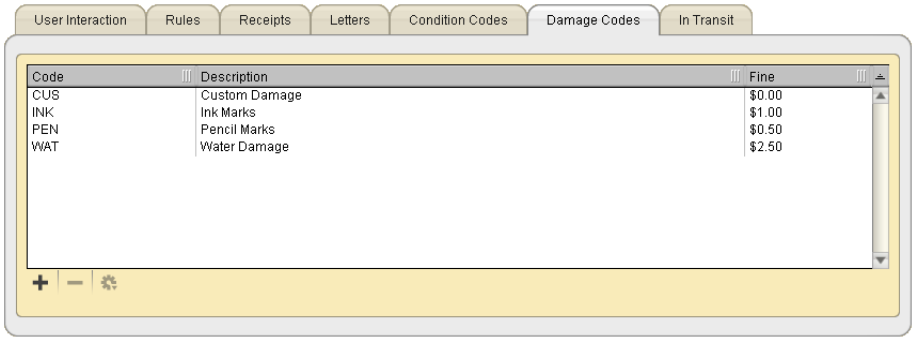


Edit Condition Codes—Removes, adds, edits, reverts, and saves textbook **Condition Codes**. These codes most often describe textbooks in best to worst condition. You can apply a **Condition Code** to a textbook under the **Copy Information** section of the **Item Management** window. **Condition Codes** can only be four characters long. The **Edit Condition** button that appears in this window allows users to apply condition codes to particular copies.

Default Condition—This drop-down menu allows the user to set default **Copy Condition Code**(s) and descriptions. Users may choose from these default conditions: **New Book**, **Used Book in Excellent Condition**, **Used Book in Satisfactory Condition**, **Used Book in Poor Condition**, **Replace this item-not usable**, **Scheduled to be discarded**, and **Unknown**. These default conditions, with the exception of the **Unknown** copy condition, can be removed or renamed. If a copy condition code that has been previously applied to an item is later deleted, those item's condition codes will default to the **Unknown** condition. Those items whose condition code has been renamed will retain the same copy condition code information and accommodate the new name.

Damage Codes tab

This tab allows operators to add, edit, or remove a list of user-defined damage codes.



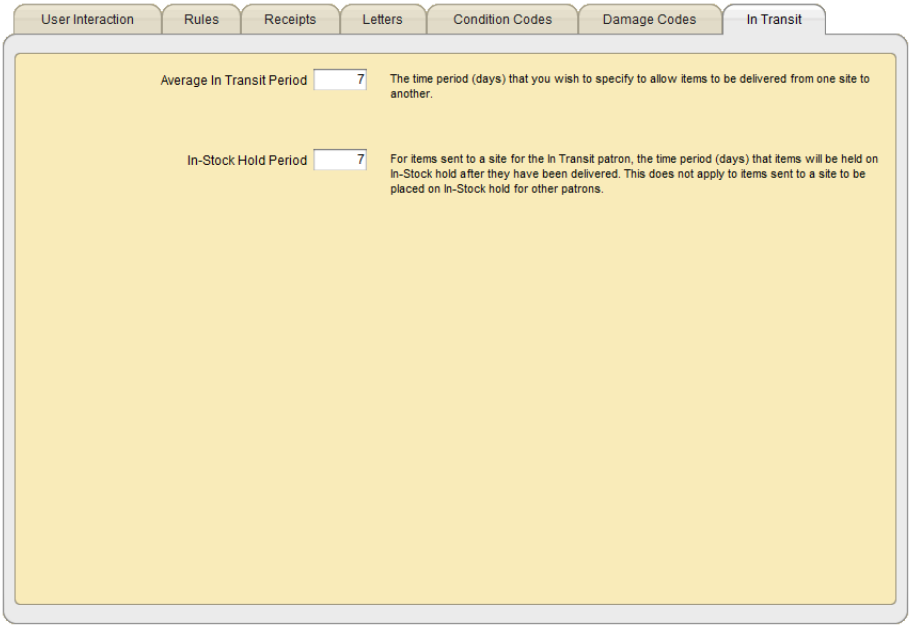
Edit Damage Codes—Removes, adds, edits, reverts, and saves default textbook **Damage Codes**. You can set the **Damage Code** (eleven characters long), **Description**, and **Fine**. **Damage Codes** can be applied from the main **Circulation** window if you have a current patron and item active by typing "DL" in the command line.

Getting Started:

Step 1. For those using the Central Union system, set the **In Transit** periods required on this tab.

In Transit tab

Use the **In Transit** tab to set the default time period (in days) to allow for items "in transit" or "in-stock" before showing up in the **In Transit - Late In Arriving** report.


User Interaction
Rules
Receipts
Letters
Condition Codes
Damage Codes
In Transit
Average In Transit Period
7
The time period (days) that you wish to specify to allow items to be delivered from one site to another.
In-Stock Hold Period
7
For items sent to a site for the In Transit patron, the time period (days) that items will be held on In-Stock hold after they have been delivered. This does not apply to items sent to a site to be placed on In-Stock hold for other patrons.

Average In Transit Period—Use this field to set the time period (in days) that you wish to allow items to be delivered from one school to another. Default is 7.

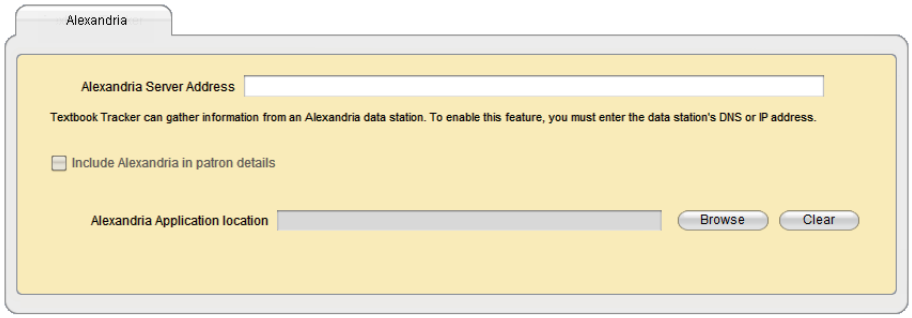
In-Stock Hold Period—For items sent to a school for the **In Transit** patron, the time period (days) that items will be held on **In-Stock Hold** after they have been delivered. This does not apply to items sent to a school to be placed on **In-Stock Hold** for other patrons. Default is 7.

Alexandria Preferences

> **- NOTE -**
>
> You only need to set your **Alexandria System Preferences** if you have purchased and licensed use COMPanion's Alexandria application.

Alexandria tab

Textbook Tracker can gather information from an Alexandria Data Station and/or launch it directly from the **Show** menu depending on the information that you provide here.


Alexandria
Alexandria Server Address
Textbook Tracker can gather information from an Alexandria data station. To enable this feature, you must enter the data station's DNS or IP address.
Include Alexandria in patron details
Alexandria Application location
Browse
Clear

Alexandria Server Address—Enter your Alexandria Data Station's remote IP address (e.g. 123.45.67.890).

Include Alexandria in Patron Details—If this box is checked, the "Q" command will automatically include Alexandria patron details. If not, use the "QT" command to include Alexandria patron details.

Alexandria Application Location—Click the **Browse** button to open a standard operating system explorer/finder window. Guide Textbook Tracker to the directory folder containing your Alexandria application. Once you have supplied a working directory and selected the Alexandria application, the **Run Alexandria** option appears in Textbook Tracker's **Show** menu *(see "Show Menu" on page 42 for more information)*.

Notes:

Items Preferences

Getting Started:

Not all of the preferences in the **Management** tab need to be configured when performing your initial setup of Textbook Tracker. Listed below are those that COMPanion suggest that you set immediately:

Step 1. Go to **Edit** on the main menu bar and select **System Preferences (Cmnd/Ctrl+L)**.

Step 2. Click on the **Items** icon in the **Management** section of the **System Preferences** window.

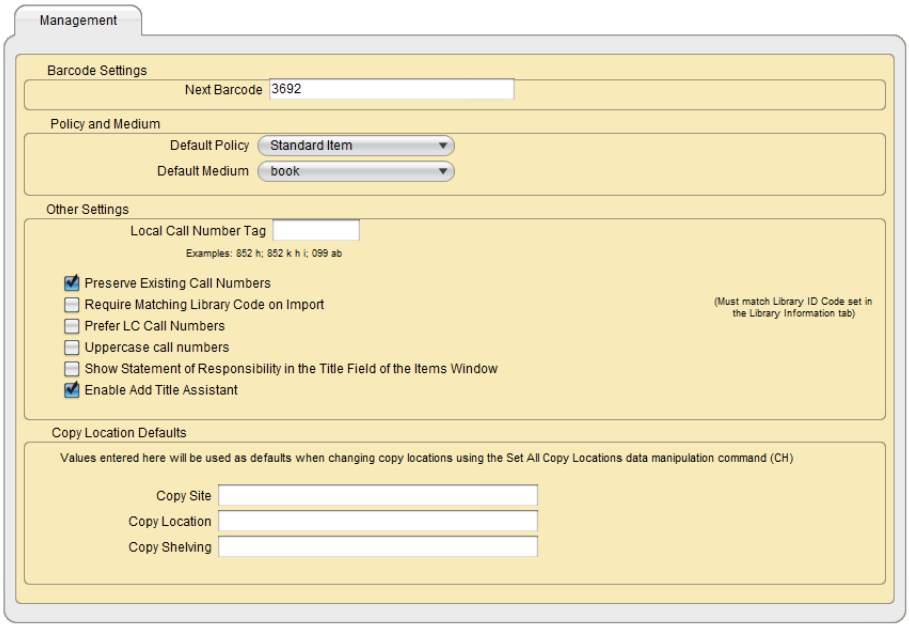
Step 3. Enter the **Next Item Barcode** to be used during cataloging or importing. Please note that this *must* be set individually for each school/library/site.

Step 4. If there is a MARC tag and subfield where the **Local Call Number Tag** is to be stored, provide it in this field. If the **Local Call Number Tag** is used for an identifier in a Central Union environment, *do not* enter one.

Step 5. If you wish to use your existing call numbers instead of pulling from the call number tags included in imported MARC records, check the **Preserve Existing Call Numbers** box.

Step 6. Configure any other preferences on the **Management** tab by checking the appropriate box, making a selection from the drop-down menu(s) or providing information in blank fields.

Management tab


Management
Barcode Settings
Next Barcode 3692
Policy and Medium
Default Policy Standard Item
Default Medium book
Other Settings
Local Call Number Tag
Examples: 852 h; 852 k h i; 099 ab
Preserve Existing Call Numbers
Require Matching Library Code on Import
Prefer LC Call Numbers
Uppercase call numbers
Show Statement of Responsibility in the Title Field of the Items Window
Enable Add Title Assistant
(Must match Library ID Code set in the Library Information tab)
Copy Location Defaults
Values entered here will be used as defaults when changing copy locations using the Set All Copy Locations data manipulation command (CH)
Copy Site
Copy Location
Copy Shelving

Barcode Settings

Next Barcode—This field contains the next available item barcode number. When you enter a new copy record, Textbook Tracker will automatically assign the next available barcode (unless you assign a number manually). You should set this field when you first configure Textbook Tracker, so that any copies you add are assigned an item barcode number that coincides with your numbering strategy.

Policy and Medium

Default Policy—Using this drop-down menu, you can set the default item policy for newly added records. The default is **Standard Item**. If you assign an item policy that is later removed from the system, the **Default Policy** will return to **Standard Item**.

Default Medium—Using this drop-down menu, you can set the default item medium for newly added records. Default is **Book**.

Other Settings

Local Call Number Tag—During import, if your call numbers are not kept in the customary location within the MARC record (Textbook Tracker uses **852_a**), use this preference to configure where Textbook Tracker should check first for the call number.

If you enter a valid "tag_subfield," Textbook Tracker will scan that point in the MARC record to find the call number. If your call numbers are typically in tag **900a**, enter **900a** in this field. The default setting is blank.

Preserve Existing Call Numbers—When this checkbox is set, existing call numbers will never be modified during an import or during automatic SmartMARC record updating. Default is `ON`.

Require Matching Library Code on Import—When this box is checked, only copy information with your library code (or no library code) in the **852_a** tag is imported (must match **Library ID Code** set in the **Site Information** window, page 69). All other library codes are ignored. Default is `OFF`.

Some districts keep a Central Union catalog with all district holdings. When these records are transferred to an individual site, each title may contain holding information for other sites in the district. This option allows each site to import the holding records that belong only to that collection. Other holding records are automatically removed from the MARC record before it's saved.

Prefer LC Call Numbers—When this checkbox is set, Textbook Tracker looks first for a Library of Congress Call Number (in the **050** tag) when looking for call numbers in an imported MARC record. If no **050** tag is found, Textbook Tracker will look for call numbers in other tags. Do *not* check this preference if you use Dewey call numbers. Default is `OFF`.

Uppercase Call Numbers—When this box is checked, alphabetic characters in call numbers will be saved and displayed in uppercase.

Show Statement of Responsibility in the Title Field of the Items Window—When this box is checked, Textbook Tracker shows the Statement of Responsibility tag **245_c** in the title field of the **Items** management window. Default is `OFF`.

Enable Add Title Assistant—The **Add Title Assistant** is a guided cataloging helper, useful in reducing the number of duplicate entries in your database, by searching against the items in your local collection; also offers convenient access to specified Z39.50 databases in order to provide new, full records process simplification. When you create an item record and this box is checked, the **Add Title Assistant** window will appear in lieu of an unlocked and empty item management record.

For those who *do not* wish the **Add Title Assistant** window to appear when adding new items to the database, it can be disabled by removing the check from this box.

There is also an override key combination for this preference, allowing the operator a "single time" use of the functionality in the reverse state of the current preference setting.

If *enabled*, using the `<Alt+Ctrl+N>` (Windows) or `<Option+Cmnd+N>` (Macintosh) key combination will skip the **Add Title Assistant** window and take the user directly to an unlocked, new item record in either **Item View** or **MARC View** (the default view for which you've selected to add a new title). Alternately, if this preference is *disabled*, a user can temporarily activate the **Add Title Assistant** window by using the override key combination.

Copy Location Defaults

Values entered here will be used when changing copy locations using the **Set All Copy Locations** data manipulation command (`CH`).

Copy Site—Supply the default value for the copy site field when changing copy locations.

Copy Location—Supply the default value for the copy location field when changing copy locations.

Copy Shelving—Supply the default value for the copy sublocations field when changing copy locations.

Barcodes Preferences

Getting Started:

The **Barcodes System Preferences** allow you to configure how Textbook Tracker should increment new patron and item barcode numbers. On these tabs, you will configure the barcode range for temporary items and establish any special barcode handling. For instance, if your data contains any Follett Interleaved 2 of 5 barcodes, you would indicate that here.

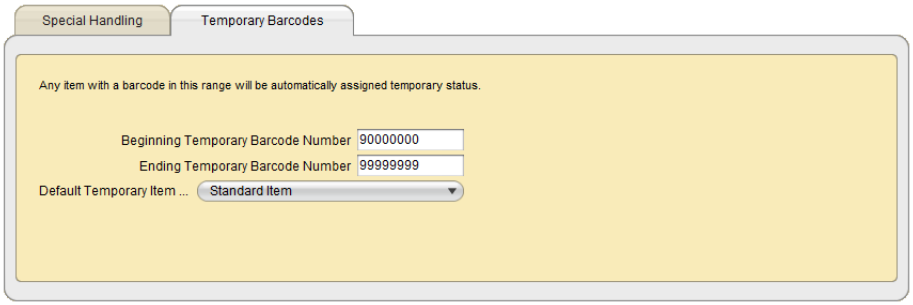
Step 1. Go to **Edit** on the main menu bar and select **System Preferences (Cmnd/Ctrl+L)**.

Step 2. Click on the **Barcodes** icon in the **System Administration** section of the **System Preferences** window.

Step 3. If your item/patron barcodes have a leader that should be skipped, enter the leader in the **Special Handling** tab. Also use the **Special Handling** tab to configure how Textbook Tracker handles new barcodes assigned to patrons and/or items.

Temporary Barcodes tab

Set the preferences that deal with your site's temporary barcode scheme.



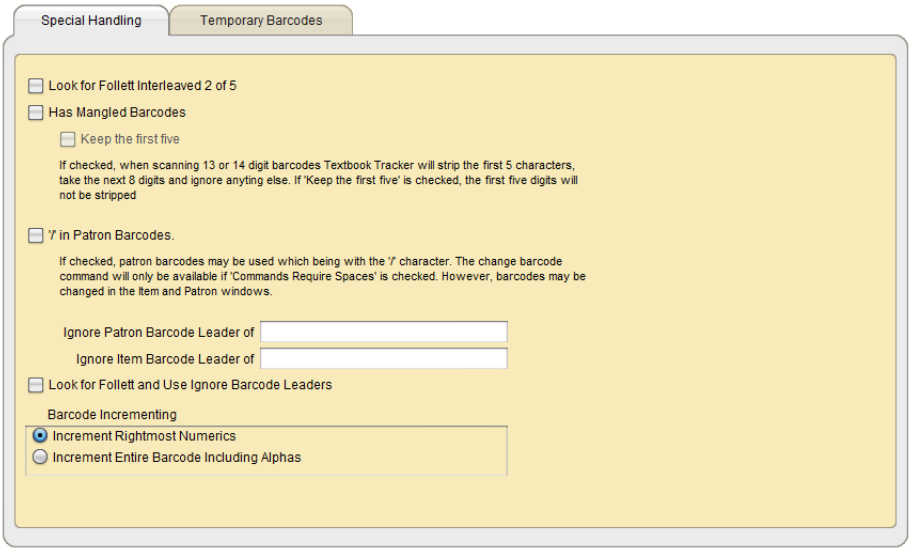
Beginning Temporary Barcode Number—Enter the first number of the barcode range that you want dedicated to temporary items. Textbook Tracker will treat any barcodes entered within the **Beginning / Ending** range as a temporary item (if the number hasn't previously been assigned to a patron or item). Default is `90000000`.

Ending Temporary Barcode Number—Enter the last number of the barcode range you want dedicated to temporary items. Textbook Tracker will treat any barcodes entered within the **Beginning / Ending** range as a temporary item (if the number hasn't previously been assigned to a patron or item). Default is `99999999`.

Default Temporary Item Policy—Use this drop-down menu to set the default policy that Textbook Tracker should use when calculating due dates and fines on temporary items. See page 75 for more information on **Standard/System Item** policies. Default is **Standard Item**.

Special Handling tab

Configure these additional preferences that deal with your site's barcode scheme.


Special Handling
Temporary Barcodes
Look for Follett Interleaved 2 of 5
Has Mangled Barcodes
Keep the first five
If checked, when scanning 13 or 14 digit barcodes Textbook Tracker will strip the first 5 characters, take the next 8 digits and ignore anyting else. If 'Keep the first five' is checked, the first five digits will not be stripped
'/' in Patron Barcodes.
If checked, patron barcodes may be used which being with the '/' character. The change barcode command will only be available if 'Commands Require Spaces' is checked. However, barcodes may be changed in the Item and Patron windows.
Ignore Patron Barcode Leader of
Ignore Item Barcode Leader of
Look for Follett and Use Ignore Barcode Leaders
Barcode Incrementing
Increment Rightmost Numerics
Increment Entire Barcode Including Alphas

Special Handling

Look for Follett Interleaved 2 of 5—If you have any items with Follett interleaved 2-of-5 barcode labels, check this box. This setting looks for all barcodes that are exactly 10 digits long and removes the last three digits that Follett uses as check digits. Default is `OFF`.

Has Mangled Barcodes—If checked, when scanning 13- or 14-digit barcodes, Textbook Tracker will strip off the first 5 characters, take the next 8 digits and ignore any remaining characters. Checking this box activates the **Keep the first five** checkbox, which, if marked, ensures that the first five digits will *not* be stripped when using **Has Mangled Barcodes**. Default is `OFF` for both.

'/' in Patron Barcodes—If checked, patron barcodes that begin with the "**/**" character may be used. The **Change Barcode** circulation command will only be available if **Commands Require Spaces** *(see "Rules tab" on page 83)* is checked. However, barcodes may be changed in the **Items** and **Patrons** window.

Barcode Settings

Ignore Patron Barcode Leader of—If you are using patron barcode numbers not designed for Textbook Tracker, you can have Textbook Tracker automatically ignore leading characters. For example, if your patron barcodes have the text "`PAT`" in front of each barcode, enter "`PAT`" in this field. Textbook Tracker will ignore the "`PAT`" at the beginning of each barcode label. If you don't require this feature, leave the field blank.

Ignore Item Barcode Leader of—If you are using item barcode numbers not designed for Textbook Tracker, you can specify that Textbook Tracker automatically ignore leading characters. For example, your item barcodes may have the text "`ITM`" in front of each barcode, enter "`ITM`" in the **Ignore Barcode Leader** of field. Textbook Tracker will ignore the "`ITM`" at the beginning of the barcode label. If you have no need of this feature, leave the field blank.

Barcode Incrementing

Increment Rightmost Numerics—When this option is selected, new barcodes should only increment the rightmost numeric digits (even when using alphanumeric barcodes). In other words, when incrementing rightmost numerics, the barcode increments to the right and grows to the right. For example, the barcode following `aaa999` should be `aaa1000`. This is the default setting.

Increment Entire Barcode Including Alphas—When this option is selected, new barcodes modify both alpha and numeric characters, increment to the right, and grow to the left. For example, the barcode following `aaa999` would be `aab000`. The barcode `zzz999` becomes `1aaa000`, then `1aaa001`, then `1aaa002`, and so on and so forth; eventually becoming `1zzz999`, which then turns to `2aaa000`. Remember that, with this formula, (Z + 1 = 1A).

Hidden Options tab

If you need to enable/disable this tab, please contact COMPanion's Technical Support team.

Repair Trailing Alpha Check Digit—If this box is checked, items that *would* match a scanned barcode (if they had the exact same trailing alpha check digit) are repaired so that their barcodes match exactly.

Repair Trailing Numeric Check Digit—When this box is checked, items that *would* match a scanned barcode (if they had the same trailing numeric check digit) are repaired so that their barcodes match exactly.

Ignore Leading Zeros on Barcodes—When checked, if barcodes begin with zeroes, those zeroes must be entered in the data if they are scannable barcodes.

Allow Spaces in Barcodes—If checked, scanned barcodes will be tested to see if they are barcodes before they are tested to see if they are commands.

Notes on Barcodes:

Cataloging Preferences

Getting Started:

Use the **Cataloging System Preferences** to configure general information about your catalog headings, default medium pictures, and leading articles.

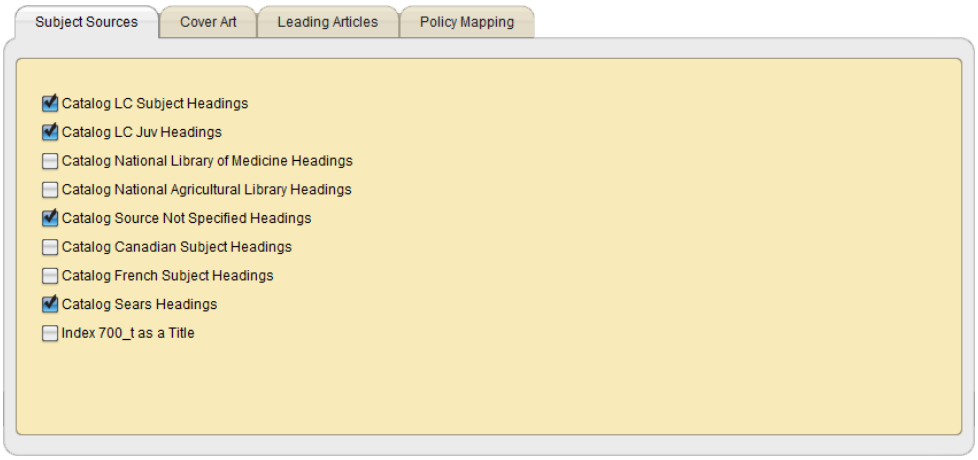
Step 1. Go to **Edit** on the main menu bar and select **System Preferences (Cmnd/Ctrl+L)**.

Step 2. Click on the **Cataloging** icon in the **Management** section of the **System Preferences** window.

Step 3. COMPanion recommends that you leave all of the default settings on the **Subject Sources** tab if your site is located within the United States.

Subject Sources tab

These options tell Textbook Tracker which subject headings you want catalogued. Since cataloguing only occurs during an import or modification of records, changes made here will only be reflected in new records unless you rebuild your database. If you do not understand these settings, please talk to a qualified MLS librarian or MARC expert or call COMPanion's Technical Support team.



Catalog LC Subject Headings—Default is **ON**.

Catalog LC Juv Headings—Default is **ON**.

Catalog National Library of Medicine Headings—Default is **OFF**.

Catalog National Agricultural Library Headings—Default is **OFF**.

Catalog Source Not Specified Headings—Default is **ON**.

Catalog Canadian Subject Headings—Default is **OFF**.

Catalog French Subject Headings—Default is **OFF**.

Catalog Sears Headings—Default is **ON**.

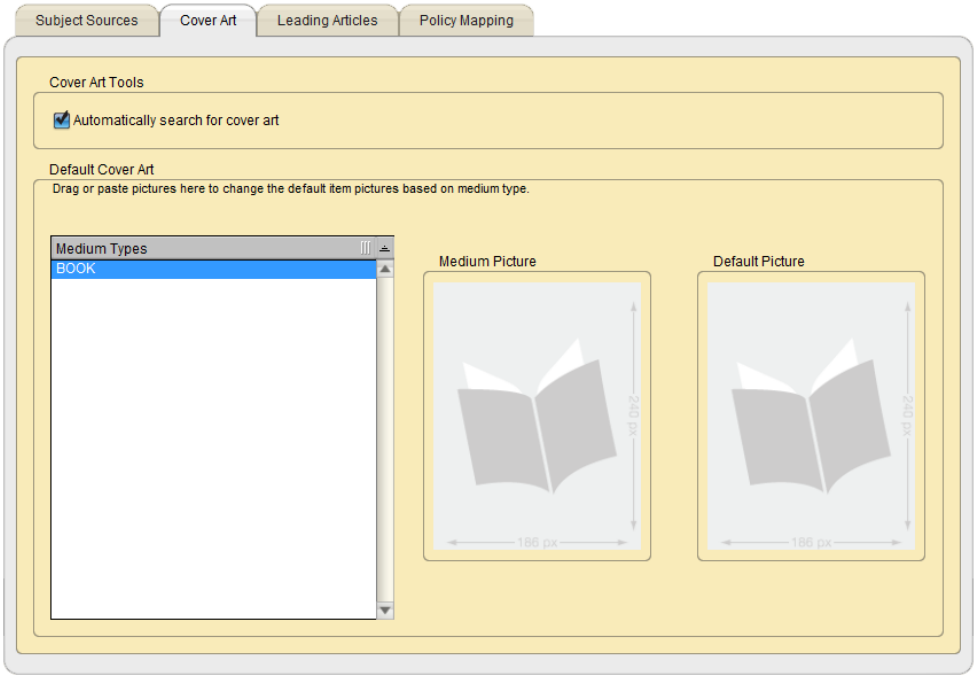
Index 700_t as a Title—Default is **OFF**.

Medium Pictures tab

The **Medium Pictures** tab allows users to apply pictures to individual or default mediums by dragging and dropping their own `GIFs`, `BMPs`, `PNGs`, `PICs`, `JPGs` (or most standard image files) onto the **Medium Picture** field. Once this is done, a new medium picture will be applied. Users can reset to the default medium picture by left-clicking in the **Medium Picture** or **Default Picture** section and selecting **Restore From Defaults**.

If you have a pictureless medium (e.g. in the case of a newly created medium), the **Default Picture** field is applied to any and all mediums lacking an individualized **Medium Picture**.

The default medium picture will appear on the **Circulation** window every time there is a current item—unless an item has cover art applied to it from within the **Item Management** window *(see "Item Management" on page 187)*.



Follow these steps to apply a new default medium picture:

Step 1. Select which medium's picture you would like to change from the **Medium Types** field on the left-hand side of the window. Alternately, if you'd like to apply a **Default Picture** to *all* the mediums that currently lack one, follow the steps below.

Step 2. Drag and drop your new medium image on to the **Medium Picture** or **Default Picture** fields on the right-hand portion of the window. Images can also be pasted into the

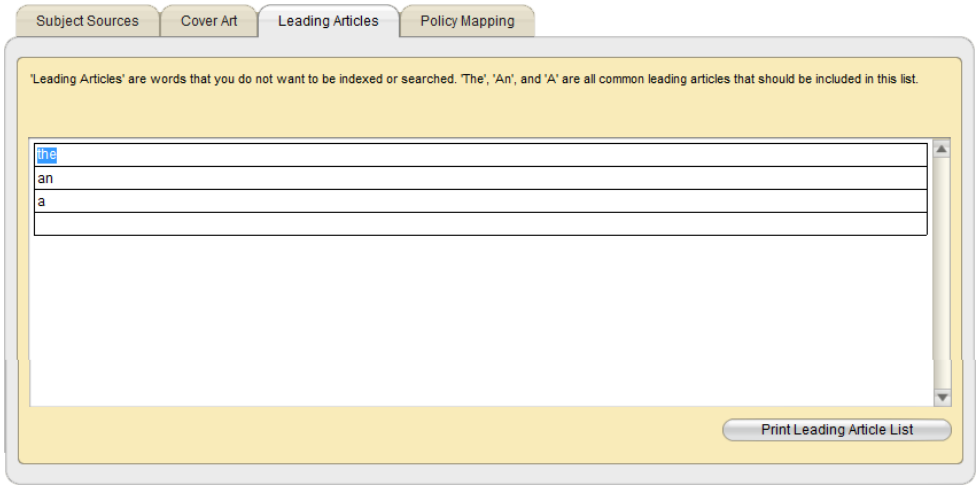
Medium Picture or **Default Picture** field from your operating system standard clipboard.

Step 3. Click **Save** to apply your changes or **Revert** to discard them.

Leading Articles tab

This preference tab allows you to specify which leading articles (e.g. *the*, *an*, *a*) should be ignored during cataloguing and searching. Since leading articles vary from language to language, this preference gives an operator total control over how they are defined.

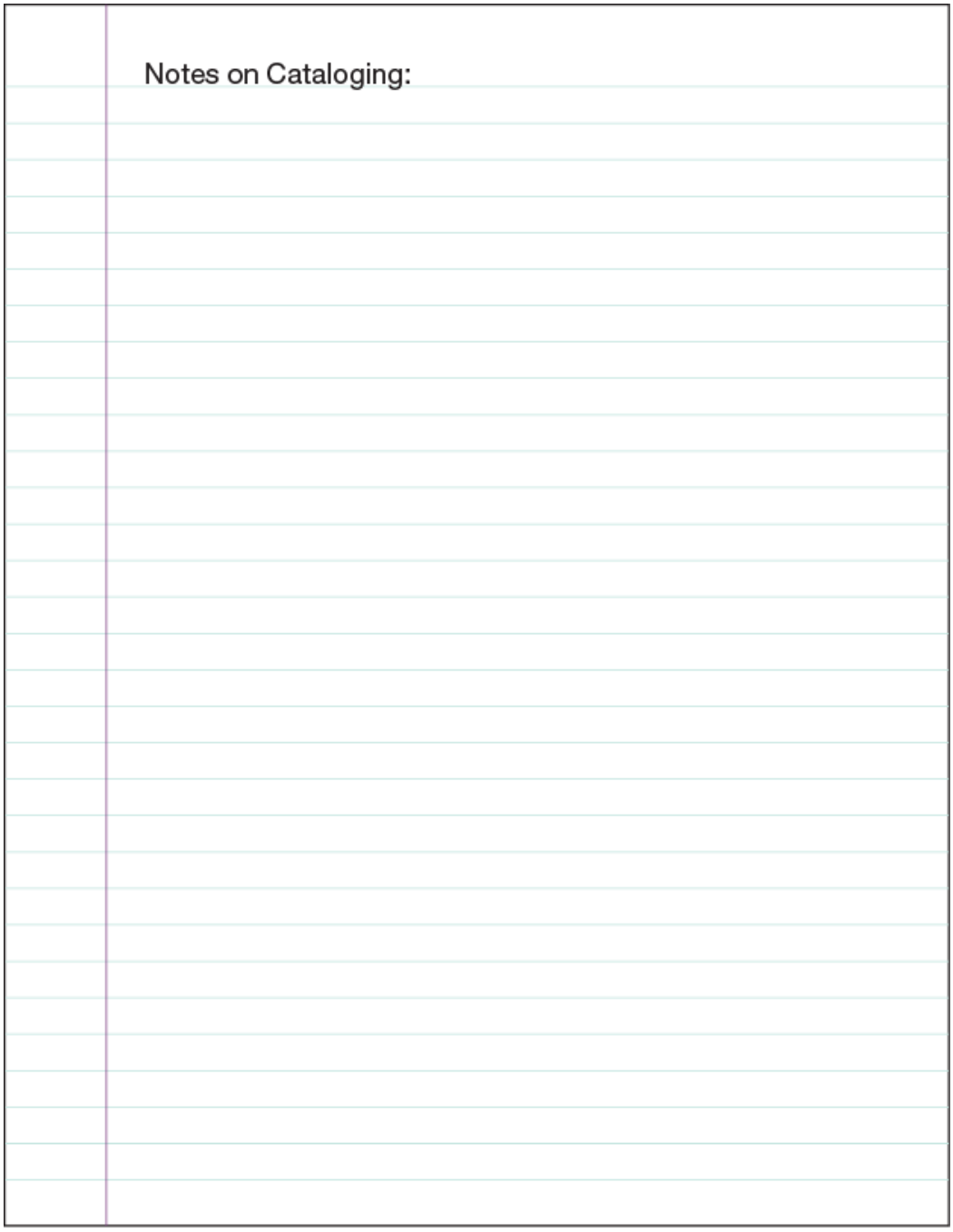
Use the **Print Leading Article List** button in the bottom-right corner of the window to print a list containing all the leading articles you've provided in the field (shown below).


Subject Sources
Cover Art
Leading Articles
Policy Mapping
'Leading Articles' are words that you do not want to be indexed or searched. 'The', 'An', and 'A' are all common leading articles that should be included in this list.
the
an
a
Print Leading Article List

Where is this preference used?

- Titles beginning with these leading articles will be sorted by the next available word. The second indicator of the **245** tag is automatically set to the correct MARC standard value for the skipped leading article.
- Series beginning with these leading articles are sorted by the next available word. The **830** tag is automatically set to the correct MARC standard value for the skipped leading article.
- When Textbook Tracker searches for titles, queries that begin with a leading article will automatically have that term skipped. Thus, the query for "The Cat in the Hat" will actually search for "Cat in the Hat."

When searching for a series, queries beginning with a leading article will automatically have that term skipped. Thus, the query "The Wizard of Oz" will actually search for "Wizard of Oz."


Notes on Cataloging:

Patrons Preferences

Getting Started:

Use the **Patrons System Preferences** to configure grade tables, default pictures and policies, and other general information about your patrons, including the **Patron Server** (if you're a licensed user).

Step 1. Go to **Edit** on the main menu bar and select **System Preferences (Cmnd/Ctrl+L)**.

Step 2. Click on the **Patrons** icon in the **Management** section of the **System Preferences** window.

Step 3. Using the **Rules** tab, check whether you want to keep patron history and whether or not to disable patron expiration dates.

Step 4. Use the **Grade Table** tab to create the grades that are in your school. The **Add** ("**+**") will allow you to add a grade level. The **Remove** ("**—**") icon allows you to delete a selected (highlighted) grade.

Step 5. Using the **Management** tab, set the **Default Patron Policy** and the **Next Barcode** that Textbook Tracker should use for a patron.

Rules tab

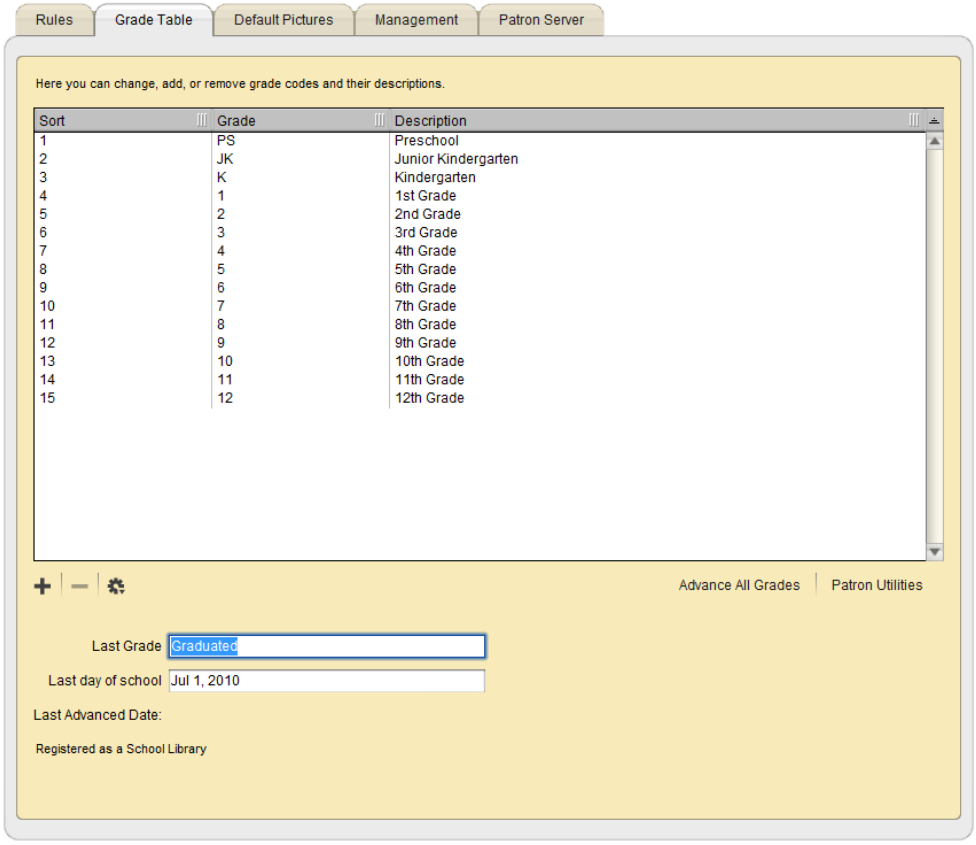
Keep History for all Patrons—Check this box if you want Textbook Tracker to keep a transaction history for all the patrons who use your site. Default is `OFF`.

Disable Expiration Dates—When checked, Textbook Tracker will ignore a patron's **Card Expiration Date** and hide the **Card Expiration Date** field in **Patrons** management window.

Mandatory Authority Control—This makes **Authority Control** active and mandatory when you add new patrons or change fields that are authority controlled. **School**, **Homeroom**, and **Grade** are all authority controlled.

Grade Table tab

Most grading and attendance software is capable of exporting **Grade/Level**. Those who are unable to import using the **Grade/Level** terminology can still assign grades by graduation date using the **Replace Information Utility**.



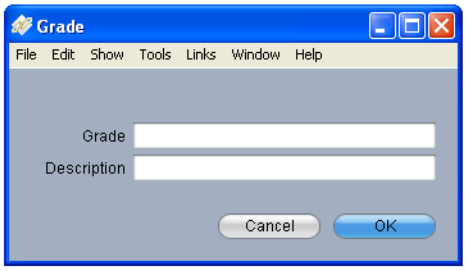
The **Grade** field is a simple list where the user can enter each grade level for their school in the order they should be sorted and incremented. This field is also "drag-and-drop" enabled so that users can change the grade/level order as necessary when new grades are added or existing grades are eliminated.

The top selection in the **Grade** field will be the first grade level, the second will be the next grade level, etc. The terms in the **Grade** table are fully customizable, allowing administrators to use whatever import terms they desire.

Last Advanced Date—When the last advance operation was performed; date is updated when the advance process has completed.

Grades/Levels must be advanced manually at the end of each school year by using the **Advance All** button or **Advance Patron Grades Utility**. Using this functionality, you can advance patrons to the next grade level until they reach graduation.

Click on the **Add** button (the "**+**" symbol) to add a new grade to the grade table.



If you would like to remove a grade from the table, highlight (select) the grade that you want removed and click on the **Remove** button (the "**—**" symbol).

If you would like to edit an existing grade on the table, highlight (select) the grade that you want edited and click on the **Actions** drop-down menu.

Last Grade—This user-defined field indicates your patron's highest (and final) level of advancement. Default is **Graduated** and the field cannot be left blank.

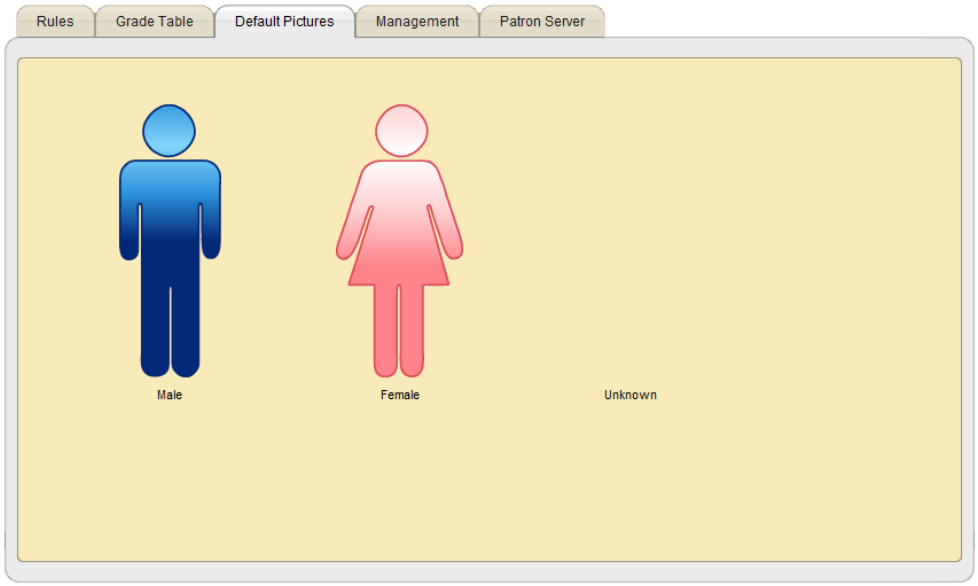
Last day of school—Used to compute the grade when importing `StudentPersonal` objects using SIF. Never rearrange the grade table if you are importing with SIF. Changing the **Last day of school** (graduation date) *does not* advance a **Grade**; changing a **Grade** *does not* change the graduation date.

Advance All—This button moves patrons with a grade/level defined in the **Grade** table up one level each time it is pressed. COMPanion recommends that you perform an **Archive** before using the **Advance Grade** button. Patrons whose grade/level are not found or defined in the **Grade** field *will not* advance.

Default Pictures tab

If your school doesn't have individual pictures attached to patrons within the **Patron Management** window, you can apply generic **Male**, **Female**, or **Unknown** identifiers to patrons based on the **Gender** field.

The **Default Patron Pictures** preference window allows users drag and drop their own `GIFs`, `BMPs`, `PCTs`, `PNGs`, `JPGs` (or most standard image files) onto the default **Patron Picture** field. Once this is done, a new default patron picture is applied. Users can reset to the default patron picture by left-clicking the patron picture and selecting **Reset From Defaults**.



Getting Started:

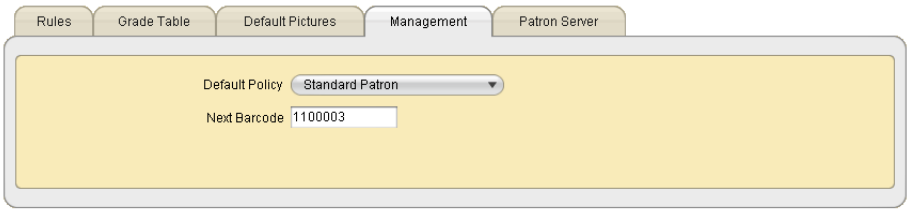
Follow these steps to apply a new default patron picture:

Step 1. Select (highlight) which default patron picture you would like to change.

Step 2. Drag and drop your new default patron image on to the **Default Patron Picture** field. Images can also be pasted into the **Default Patron Picture** field from your operating system standard clipboard.

Step 3. Click **Save** to apply your changes or **Revert** to discard them.

Management tab



Default Policy—This drop-down menu decides what the default patron policy will be for newly-added members. Use the drop-down menu to select a different default patron policy. If you later remove that patron policy, the **Default Policy** will revert to **Standard Patron**.

Next Barcode—The next available patron barcode number. When you create a new patron, Textbook Tracker will assign them the next available barcode (unless you assign them a number manually). You should set this field when you first configure Textbook Tracker so that any new patrons are assigned a patron barcode number that coincides with your numbering strategy.

Notes:

Operators Preferences

Getting Started:

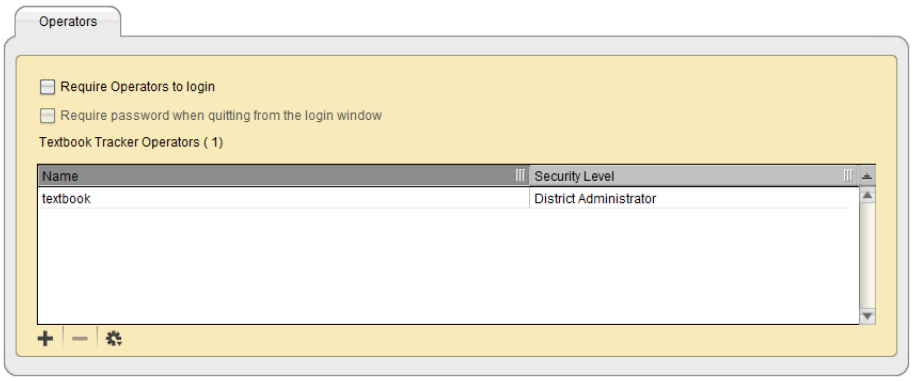
The **Operators** tab contains a list of users that have been created and assigned a security level.

Step 1. If you wish to enable security, check the **Require Operators to Login** box.

Step 2. If you also want to require a password when quitting from the **Login** window, check the **Require password when quitting from the login window** box.

Operators tab

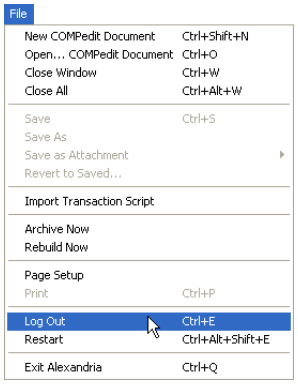
The **Operators** tab allows you to setup and create any number of Textbook Tracker operators, each with their own unique (or identical) security level. Although you may have operators with duplicate security levels, you *can not* have duplicate operator names.



This window contains a large **Textbook Tracker Operators** field, which is basically a list that contains the **Name** and **Security Level**(s) of your existing Textbook Tracker operators; you may select (highlight) any of the operators contained within this field in order to edit their information or remove them completely.

At the top of the tab there is a box to check for **Require Operators to Login**. It is highly recommended that passwords and security be used. The default setting is passwords/security turned off.

This preference tab also contains the **Add Operator** ("**+**"), **Remove Operator** ("**—**"), and **Actions** buttons (located at the bottom-left corner of the window); these buttons allow you to create, remove, and edit Textbook Tracker operators.



Activating Security

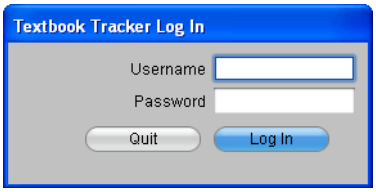
Check the **Require Operators to Login** box on the **Operators** tab to activate Textbook Tracker's **Log In** security. When this box is checked, Textbook Tracker will require a username and optional password[1] every time that the program is launched; also, when this box is checked, Textbook Tracker will force you to create an **Administrator**-level operator that may be edited, but never removed. For new schools, the default setting for the **Require Operators to Login** checkbox is off (i.e. unchecked).

Use the **Require Password When Quitting From the Login Window** checkbox to force operators to provide an acceptable password when attempting to **Quit** from the **Log In** window.

To immediately activate the **Textbook Tracker Log In** security window (or to access Textbook Tracker as a different operator), choose **Restart** or **Log Out** from the **File** menu.

When the **Textbook Tracker Log In** (or **Permission Override**[2]) window appears, enter the appropriate **Username** and optional **Password** and click **Log In** (or **OK**) to access Textbook Tracker.

The username that you enter during log in will be recorded to the **Transaction log** as well as any failed login attempts.



Accessing Textbook Tracker as a Different Operator

There are times when you will need to access Textbook Tracker as a operator other than the one who is currently logged into the program; especially if you are required to perform a specific task that the current operator does not have the security permissions to accomplish.

For example, on a Workstation that is currently being used by a **Student Aide**, you may need to log in as the **District/Library Administrator** to change a preference—a task for which the **Student Aide** does not have authorization.

There are two ways to access Textbook Tracker as a different operator:

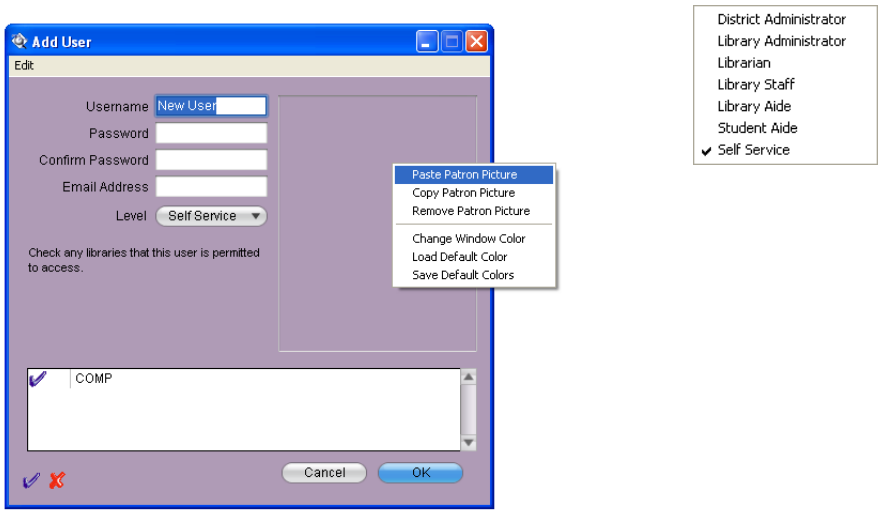
- Make sure that the **Require Operators to Login** checkbox is marked in the **Administration** preference window and then choose **Restart** or **Log Out**[3] from the **File** menu. When the **Log In** window appears, enter the appropriate **Username** and optional **Password** and click **Log In** to access Textbook Tracker as an entirely new operator.
- If the operator who is currently logged into Textbook Tracker doesn't have the security permissions to access or change a specific option or preference tab, you may supersede their authority (for a set duration) using the **Permission Override** window *(see "Permission Override" on page 163)*.

NOTE:
Usernames and passwords are *not* case sensitive.

1.If a password was not supplied when creating a new operator in the **Add Operator** window *(page 113)*, then this field will not be required.
2.If you are restricted to Aide-type security privileges, attempting to **Log Out** or **Restart** from the **File** menu will open the **Permission Override** window. For more information about **Permission Override** and how it's used, please see the information contained on page 163.
3.Some security levels require the proper permissions to perform a **Restart**.

Adding Operators

Click the **Add Operator** button (the "**+**" icon), or use <Cmnd+N> (Macintosh) or <Ctrl+N> (Windows), to add a new operator to Textbook Tracker. The **Add Operator** window will appear, requesting that you provide specific new operator information.



Enter the username[1], a password[2], confirmation password, email address, appropriate security **Level** for the new operator, and then check any sites that they will be permitted to access. If you have not previously created any operators, the **Level** drop-down menu will be limited to **District/Library Administrator** and you will be unable to change it. Once you have created a **District/Library Administrator**, you can add other new operators with access levels other than **Administration**.

The **District Administrator** security level is only meaningful for multi-collection licenses (Central Union, WAN, etc.); for all other licenses, **District Administrator** security is identical to **Library Administrator**.

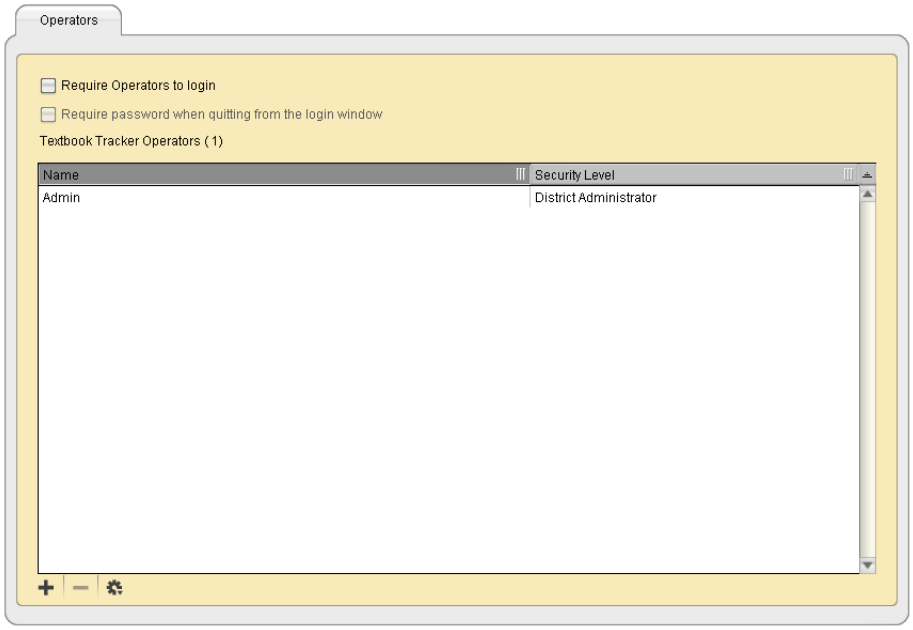
If you would like to add an operator's picture at this time, you can import a GIF, BMP, PIC, JPG (or any other standard image file); here are some ways that you can do this:

Drag and drop—Drag the graphic from the desktop or program onto the **Add Operator** window in Textbook Tracker. As you drag the picture, a box outline shows where the picture is to be placed to help you align it properly.

Paste and Copy Operator Picture[3]**—**Select a graphic and copy it to your operating system clipboard (this is usually done with commands such as **Select All**, **Copy**, and **Cut** under the **Edit** menu in the program). Go back to your Textbook Tracker **Add Operator** window and choose **Paste Patron Picture** by right-clicking (or Ctrl-clicking using a one-button mouse) in the patron picture field. The picture should now appear in the area located to the right of information fields.

1.If you choose a username that is already in use, Textbook Tracker will ask you to choose another.
2.Passwords are *not* case sensitive. Upper and lowercase characters match. Although you may leave the Password field blank (meaning that a operator requires no password upon Log In), it is *strongly* recommended that this is *not* done.
3.Windows operators are required to have Apple's QuickTime installed to view some picture formats.

When you click the **OK** button, the new operator **Name** and **Security Level** will appear in the **Textbook Tracker Operators** field of the **Operators** tab.



Removing Operators

To remove an Textbook Tracker operator, select (highlight) the operator **Name** from the **Textbook Tracker Operators** field and click the **Remove Operator** button (the "**—**" icon); when asked if you wish to delete the operator, choose **Yes**. If you have **Textbook Tracker Operators** with security levels other than **Administrator** (e.g. **Librarian** or **Aide**) you will be unable to remove the **District/Library Administrator** unless you have an additional **District/Library Administrator**.

Edit Operators

You may edit the username, password, email address, and security level of any existing Textbook Tracker operator. To edit an existing operator's information, double-click on a operator's name in the **Textbook Tracker Operators** field. Alternately, you may select (highlight) the operator's name from the **Textbook Tracker Operators** field and select **Edit Operator** from the **Actions** menu (located at the bottom left-hand side of the window). Doing this opens the **Edit Operator** window (similar to the **Add Operator** window described on page 113); using this window, you may change any of the operator information fields. If you have **Textbook Tracker Operators** with security levels other than **Administrator** (e.g. **Librarian** or **Aide**) you will be unable to change or remove the **District/Library Administrator** security level unless you have an additional **District/Library Administrator**.

Security Preferences

Getting Started:

This preference is used to assign access levels for operators. A user's access level determines what operations they are allowed to perform. The left pane of the window lists the kinds of security groups that can be established.

The first operator that should be established is the **Library Administrator**. This operator, once established, cannot be deleted until a second person is entered as an administrator. Do not forget to create a password and login for this operator since it must be used to examine, edit, add or delete registered operators and address books.

Default Security Groups

Below are the default security levels available within Textbook Tracker. Each of these default security levels can be edited; however, they can *not* be deleted or renamed.

District Administrator—Full access to every control and setting within Textbook Tracker, including the ability to examine and change registered operators. Operators at this level can edit district level preferences and have access to all site preferences. All other access levels can only modify records from their assigned collections. The **District Administrator** security level can not be modified.

Library Administrator—Full access to every control and setting within Textbook Tracker, including the ability to examine and change registered operators. Operators with this security level can only edit preferences for their assigned collection.

Librarian—Full access to every control and setting within Textbook Tracker except the ability to examine registered operators and **Address Books**.

Library Staff—Access to all system functions and reports except **System Preferences**, **Import** and **Utilities**.

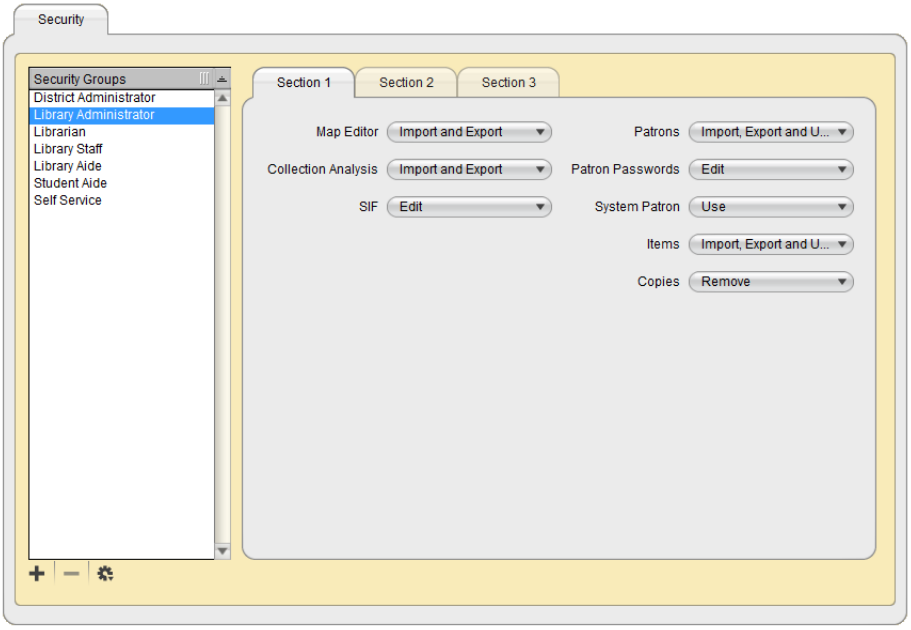
Library Aide—Access to Textbook Tracker Workstation capabilities and standard circulation commands, with the authority to allow restricted actions. For example, if a patron has too many books issued, a warning message appears when the patron tries to check out another book. With this security level, the library aide can override the message and allow the patron to check out another book.

Student Aide—Access to Textbook Tracker Workstation capabilities and standard circulation commands, but no authority to allow restricted actions. See the description of **Library Aide** (listed above) for an example of a restricted action.

Self-Service—Supports the **Check In**, **Check Out**, **Details**, and **Renew** capabilities. A simplified version of the **Circulation** window is opened when **Self-Service** mode is activated. At this security level, overdue fines are automatically recorded with no opportunity to accept payment, or forgive/adjust fines. Fines are still displayed in the transaction log.

Security tab(s)

The options contained in the tabs of the **Security** preference window allow an administrator to modify existing or create custom security levels for Textbook Tracker operators. An operator's security level determines what Textbook Tracker operations the user is allowed to perform.



Textbook Tracker comes standard with several default security levels; from **District Administrator** to **Self-Service** security levels. **District Administrator** is the least restrictive and allows unlimited access to Textbook Tracker preferences and settings. **Student Aide** is the most restrictive security level.

Textbook Tracker allows operators to create their own custom security levels by manipulating a list of permissions.

Until you set up a **District** or **Library Administrator** operator and enable **Require Operators to Login**, Textbook Tracker will launch with full administrative privileges. An **Administrator** is the only security level that allows you create new Textbook Tracker operators. Once you've established an **Administrator**, if no other security level is selected, then **Administrator**-level access will be the default upon launch.

If the **Require Operators to Login** box is checked *(see ""Activating Security" on page 112 for more information)*, you may select **Restart** or **Log Out** from the **File** menu to access Textbook Tracker as an operator with a different security level.

Adding, Editing, and Removing Custom Security Levels

Operators with the appropriate authority can add, edit, or remove any of Textbook Tracker's security levels with the exception of the default security levels, which *can* be edited, but *not* removed or renamed.

Add—This button (the "**+**" icon located in the lower-left corner of the **Security System Preference** window) opens the **Create New Security Level** window.

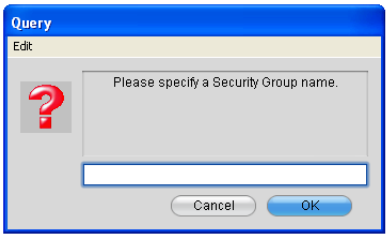
Remove—Operators with the appropriate authority can remove an operator-created security level by highlighting (selecting) the level from the **Security Groups** section of the **Security System Preference** window and clicking the **Remove** button (the "**—**" icon). Operators will be asked if they are sure they would like to remove the selected security level; click **OK** to proceed or **Cancel** to abort the removal. Operators will *not* be able to remove any of Textbook Tracker's default security levels.

Actions—This menu, located on the lower-left corner of the **Security System Preference** window, allows you to **Remove**, **Duplicate**, **Export**, **Import**, or **Print** any of the selected (highlighted) security groups.

NOTE:
By default, only the **District** and **Library Administrator** can add custom or edit existing security levels.

Creating A New Security Level

This window, which allows operators to create their own custom security levels, can be accessed by clicking on the **Add** button (the "**+**" icon located on the lower-left corner of the **Security** preference window).



If you would like to create a new security level based on an existing security level and its list of enabled and disabled security options, select (highlight) the security level that you would like to have duplicated from the **Security Group** field, and select **Duplicate** (`Cmnd/Ctrl+D`) from the **Actions** menu.

You may also choose to create a new security level that isn't based on any that currently exist in your system. In this instance, some operators will find it easier to have all of their security options enabled or disabled when creating a new security level from scratch. Choose **Yes** to have all access turned on or **No** to have all access turned off.

After you have successfully created/duplicated a new security level, it will appear in the **Security Groups** field of the **Security System Preference** window.

From this point on, you may treat the newly created/duplicated security level as you would any existing security level; it may be edited, renamed, or it may be completely removed from the system.

Editing A New Security Level

This ability to edit an existing (custom or default) security level, can be accessed by selecting (highlighting) one of the **Security Groups** on the **Security** preference window and then toggling[1] any of the drop-down menus located in the **Security** tabs (**Section 1**-**3**). You can use these drop-down menus as a quick reference to see how other security levels operate or to quickly change a specific permission on several different security levels.

You may edit the name of the current security level by selecting **Rename** from the **Actions** menu. Doing so will open the **Query** window. Input the new security level name and click **OK** when you are satisfied with your changes. Operators will be unable to change the names of Textbook Tracker's default starting security levels and each security level name *must* be unique.

Removing A Security Group

You may remove the currently selected security level by clicking on the **Remove** button (the "**—**" icon). Operators will be asked if they are sure they would like to remove the selected security level; click **OK** to proceed or **Cancel** to abort the removal. Operators will *not* be able to remove any of Textbook Tracker's default starting security levels. Once a security level has been deleted, it can not be restored.

Textbook Tracker security permissions are categorized and compartmentalized into groups of similar permissions (e.g. **Preferences**, **Data**, **Circulation**, **Utilities**, etc.). You may toggle between these categories of permissions using the **Section 1**-**3** tabs provided in the **Security** window.

Each tab refers to a particular set of permissions. For example, the **Section 1** tab contains security permissions that pertain to items, item copies, and patrons.

By using the drop-down menus contained within these tabs, you can enable or disable specific security permissions for the existing security level. For example, if you are creating a custom security level that would enable operators to import orders, then select **Import, Export, and Utilities** from the **Circulation** drop-down menu in the **Section 2** tab.

When you have finished editing all of your security permissions, click **Save** to keep your changes or **Revert** to discard them. You will be required to **Save** or **Revert** before toggling between any other security levels or leaving the **Security** window.

NOTE:
If you would like more information on a specific security permission, you can examine their **Tool Tips** by holding down the `<Ctrl>` (Windows) or `<Option>` (Macintosh) key and moving over the permission names.

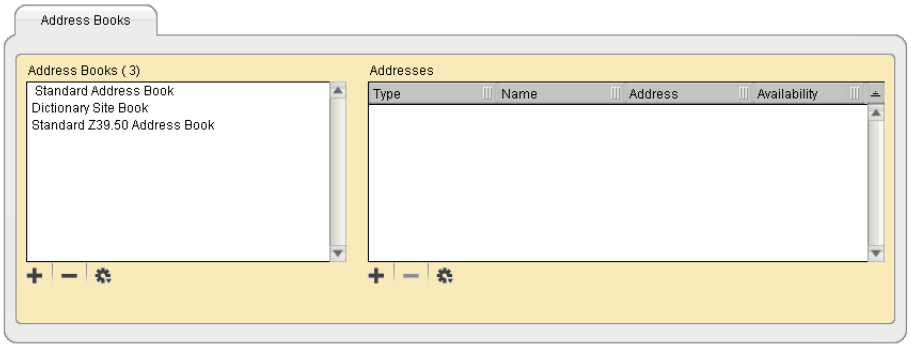
1.In technical terms, toggle means "to alternate between two or more electronic, mechanical, or computer-related options, usually by the operation of a single switch, drop-down menu, or keystroke (e.g. *toggled back and forth between two windows on the screen*)."

Address Book Preferences

> **- NOTE -**
>
> Both Textbook Tracker WAN access and Z39.50 capabilities are optional features of Textbook Tracker. You must purchase separate licenses to use these features. If you have not purchased these options, WAN and Z39.50 capabilities will not be active in your system.

Getting Started:

Address Books allow your Workstations to communicate with other Textbook Tracker Data Stations in your district. With the optional Z39.50 or wide area network (**WAN**) feature of Textbook Tracker, you are granted access to these interconnected collections. If the only collection you require access to is the one stored on your main Data Station or you don't have a **WAN** or a **Central Union** license, you won't need to set up any address books—Textbook Tracker defaults will be set to the appropriate configuration.

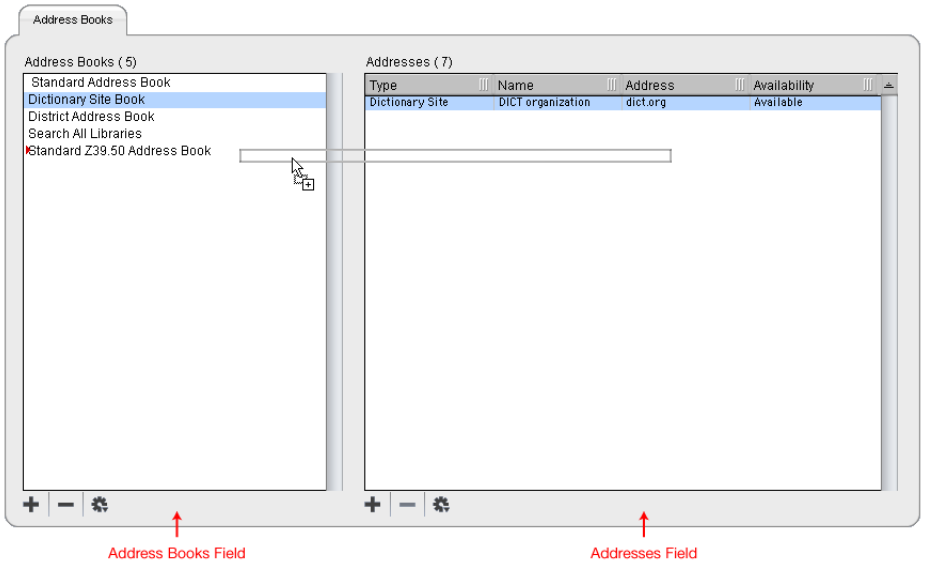


Every Data Station has an address book called the **Standard Address Book**. This **Address Book** contains all the items that are inventoried in your collection. You *may not* edit or remove the **Standard Address Book**. In Textbook Tracker, **Address Books** are used mainly for **Reports** and **Utilities** and their corresponding **Sites** tab.

Adding New Address Books

You may add as many different address books as you need to manage your collections. Since you can specify which address books your Workstation will use by default, additional address books can be used for more extensive searches. Click on the **New** ("**+**") button under the **Address Books** field to add a new address book. Your Data Station's local collection is represented as the **Standard Address Book**.

Address books may contain other address books; you can copy (add) an existing address type (e.g. **Textbook Tracker Data Station**, **Alexandria Data Station**, **Dictionary Site**, **Z39.50 Site**, **Embedded Book**) to an existing address book by dragging an address line from the **Addresses**[1] field onto one of the address books contained within the **Address Book** field. In the example below, the **Dictionary Site** address type is being added to the **Standard Z39.50 Address Book**; a helpful red navigation arrow has appeared to the left of the **Standard Z39.50 Address Book** name to help guide your selection.



1. When you drag an **Address** from one **Address Book** to another, the **Address** is *always* copied. If you want an address removed from the **Address Book** which is was copied, use the **Remove** ("**—**") button.

How to Create a New Address Book

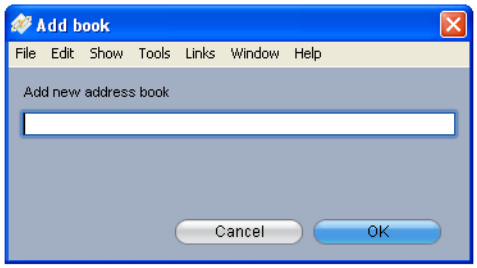
Using the **Address Books** preference window, you can create an **Address Book** (which can then contain a group of **Addresses**). When a patron searches for an item under a selected **Address Book**, all of the addresses contained in *that* **Address Book** are searched. This makes it easy for patrons to search multiple address types and collections. For example, you could select an **Address Book** containing every high school in the district, or every high school within a certain zip code (as long as they have WAN codes).

NOTE:
Institutions and schools that are behind a firewall will need to open ports `1025` and `30427` in order to make their collections accessible.

To create a new address book, do the following:

Step 1. Click the **Add Book** ("**+**") button on the bottom-left of the **Address Book** preference window or `<Cmnd+N>` on Macintosh, `<Ctrl+N>` on Windows.

Step 2. The **Add Book** window will appear.



Step 3. Enter the name of the new **Address Book** you want to add.

Step 4. Click on **OK** to add or **Cancel** to cancel.

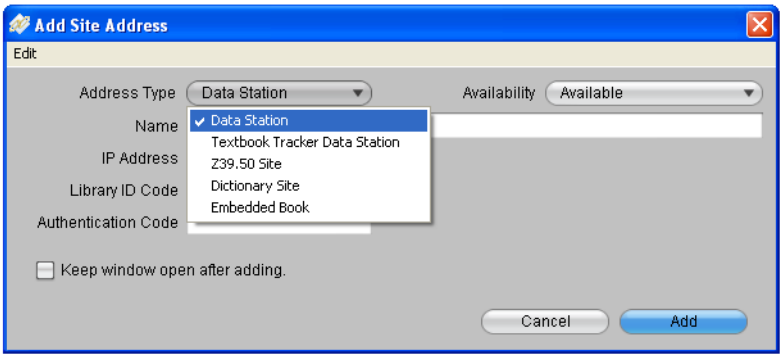
Step 5. You can now add **Addresses** to your newly created **Address Book** by following the subsequent instructions.

Adding Addresses to an Address Book

Step 1. Click on (select or highlight) an *address book* name in the **Address Books** field (located on the left-hand side of the **Address Books** window); preferably the one for which you'd like to add a new **Address**. Your new *address* will appear in the **Addresses** section of the **Address Books** preference window.

Step 2. Click the **Add Address** button ("**+**") located below the **Addresses** section of the **Address Books** window.

Step 3. An **Add Site Address** window will appear (as shown below):



Step 4. Using the **Add Site Address** window, choose the type of address you'd like to add from the **Address Type** drop-down menu. The **Add Site Address** window options will vary depending on the **Address Type** you choose. Some **Address Type**(s) may not be available if your data is not registered for a particular feature or module (e.g. **Z39.50 Site**).

These different **Address Types** will be described in the "Address Books" section of the Textbook Tracker Online Wiki.

Step 5. If you are going to be adding an additional address after you have finished the one you are currently working on, check the **Keep window open after adding** box.

Step 6. You may continue to add *addresses* to your *address book* as necessary. Click **Add** when you are done, or **Cancel** to close the **Add Site Address** window without applying any of your changes.

Step 7. Once all **Address Book** changes have been made, click the **Add** button. Then, click the **Save** button on the **Address Book** window to save all your changes or **Revert** to undo them all.

Address Types

Choose **Alexandria Data Station**, **Textbook Tracker Data Station**, **Z39.50 Site, Dictionary Site**, or **Embedded Book** as the address you'd like to add from the **Address Type** drop-down menu. The text fields and drop-down menus of the **Add Site Address** window will vary depending on the **Address Type** you choose. Here are explanations of all your **Address Type** settings:

Availability—Use this drop-down menu to determine whether this address will be available to everyone, hidden from every connected Workstation, or hidden from everyone altogether. This selection is available for *all* address types.

Name—Use this field to name your new address book (e.g. `Central Library` or `My Data Station`). This field is available in *all* address types.

IP Address—Using this field, supply the IP address of the machine to which you are trying to connect. Leave this field blank if you only want to search your local collection (i.e. your Data Station). This field is available in all address types *except for* **Embedded Book**.

Library ID Code—A Central Union Data Station houses multiple collections under one static IP address. Those who are licensed users of Textbook Tracker's Central Union can use the **Library ID Code** field to specify a single, searchable collection within that database. This is only available in **Alexandria** and **Textbook Tracker Data Station** address types.

For example, let's say that there are ten different collections all stored on one Central Union Data Station. If you would like to create an individual address for each of these ten collections, you will need some way to distinguish one from another. Because these collections all use the same IP address, you will need to supply each address that you create with a specific **Library ID Code**. When you choose to search an address that has a specified **Library ID Code**, then only that library will be searched (instead of every collection contained on the Central Union Data Station). This is only available in **Alexandria** and **Textbook Tracker Data Station** address types.

Authentication—An **Authentication Code** is an optional, added level of security for Textbook Tracker users. If you only want specific, pre-determined Data Station(s) connecting to your Data Station's collection, you can require them to have an **Authentication Code** that you create and enter into this field. This code may be changed at any time and must match the Data Station's **Authentication Code** in order for outside systems to search the indicated Data Station or site. This is only available in **Alexandria** and **Textbook Tracker Data Station** address types.

Database—Users will be routed to the Z39.50 database that they have indicated in this field. This selection is only available for **Z39.50 Site**.

Port—This is the port required by Textbook Tracker in order to successfully search the indicated Z39.50 database. Default is 210. This selection is only available for **Dictionary** and **Z39.50 Site**.

Username and Password—Some Z39.50 servers will require a username and password. If they are required and you know them, provide them in the allotted spaces. Please keep in mind the case sensitivity of usernames and passwords. These fields are only available for **Dictionary** and **Z39.50 Site**.

Treat As Search Group—This selection can be used two ways. Users can drag and drop *address books* into the *addresses* windows of existing address books to create *submenus*—if you have **Treat As Search Group** checked, then searches are performed across *all* the Data Stations contained within the address book fields (including submenus and groups). This checkbox is only for **Embedded Book** address types.

Keep window open after adding—If you are going to be adding multiple Data Station addresses, check this box to keep the **Add Site Address** window open after you have successfully added an address. This checkbox is available on *all* address types.

Duplicating An Address Book

Select (highlight) an address book in the **Address Books** field by clicking on it. Once an address book has been selected (highlighted), select **Duplicate** from the **Actions** menu, located near the bottom of the **Address Books** field. A **Duplicate Book** window will appear. At this time, enter a unique name for your duplicate address book and click **OK**. Your duplicated address book will appear alphabetically in the **Address Books** field.

Copying An Existing Address to a Different Address Book

If an *address* has already been entered into an **Address Book**, you can copy it into another address book by selecting (highlighting) it and dragging it from the **Addresses** field and dropping it onto an address located in the **Address Books** field.

Editing the Name of an Address Book

You are only allowed to edit the names of non-system address books. You can do this by double-clicking on an address book in the **Address Books** field. A **Query** window will appear, asking you to enter a new name for the selected address book. Please remember that you will be *unable to change* the name of system address books (i.e. **Standard Address Book**).

Removing a Data Station from an Address Book

To remove an address book, select (highlight) one from the **Address Books** field by clicking on it once. You may click the **Remove** button (the "**—**" symbol) on the bottom-right hand side of the **Address Books** field. A **Message** will appear, asking if you're sure you want to remove the selected book. Click **Yes** if you are sure and **No** if you are uncertain. Once you have finished, press **Save** to keep the changes or click **Revert** to undo them.

Duplicating an Address

Select (highlight with a click) an address from the **Addresses** field by clicking on it once. After an address has been selected (highlighted), select **Duplicate** from the **Actions** menu, located near the bottom of the **Addresses** field. A **Duplicate Site Address** window will appear. Specify a name for your duplicate address and click **OK**. The new address will appear at the bottom of the **Addresses** field.

Editing an Address

Edit an address from the **Addresses** field by double-clicking on it; you may also edit an address by selecting (highlighting) one from the **Addresses** field and selecting **Edit** from the **Actions** menu, located near the bottom of the **Addresses** tab. An **Edit Address** window will appear. Make the changes you desire, then click **OK** to keep the changes or press **Cancel** to restore them to their previous settings.

Removing an Address

To remove a specific address, select (highlight) the corresponding address book from the **Address Books** field by clicking on it once. You may then select (highlight with a click) the address you want removed from the **Addresses** field and click the **Remove Address** (the "**—**" symbol) button, located on the bottom-right hand side of the **Address** field. Press **Save** to keep the changes or click **Revert** to restore the deleted address.

Circulation Groups Preferences

What are Circulation Groups?

Circulation Groups are an extremely flexible, easy way to track statistics and allow users to meaningfully bunch together groups of transactions under a single, user-designated code.

For example, **Circulation Groups** can be applied to items that have been checked out to specific teachers or groups of students; **Circulation Groups** can be the class periods, course numbers, or departments where the item is being utilized.

It is in this way that **Circulation Groups** allow for nearly infinite customization and make it easy for users to keep track of the items which have been loaned to teachers, courses, classes, or departments and all the subsequent statistics that result.

Circulation Groups should only be applied to items as they are checked out. A **Circulation Group** that has been assigned to an item will be removed when the item is checked in.

If the **Circulation Group** information that has been applied to an item needs to be kept for future reference (even after the item has been checked in), then users will be required to manually place special **Notes** on the copy records or on the patron record.

In a high school situation, a **Circulation Group** that uses the teacher, period, or class course will be the most practical. In an elementary school scenario, it might be more functional to use the teacher or subject. For instance, in elementary schools, Math and Reading students are often organized by ability and therefore sent to different teachers accordingly. Therefore, a **Circulation Group** could be created for `Grant` (teacher name) or `Math-Grant` (subject and teacher) or `Reading` (subject).

By means of the **Institution**, **Location** and **Sublocation** fields, users may be able to execute some of the same tracking abilities as **Circulation Groups**. However, in a high school or Central Union situation, the limitations of these fields might not be enough.

Circulation Groups can be easily created in Textbook Tracker without the usual lengthy set up time (especially since Textbook Tracker supports tab-delimited imports). For example, users can acquire a tab-delimited export file from the Administrator's office that contains all of the teachers, classes, courses and import them into the database very quickly.

Getting Started:

You may set up new **Circulation Group** codes using **Circulation** preferences. Once you have set up a new **Circulation Group**, it will appear in the **Circulation Groups** window, which is accessed by entering "CG" or "CN" into the command line of the **Circulation** window.

If you do not specify a **Circulation Group** code from the **Circulation Groups** window, clicking **OK** will automatically select the first code in the window (based alphabetically). Default **Circulation Group** code is MAIN.

Step 1. Go to **Edit** on the main menu bar and select **System Preferences (Cmnd/Ctrl+L)**.

Step 2. Click on the **Circulation Groups** icon in the **Circulation** section of the **System Preferences** window.

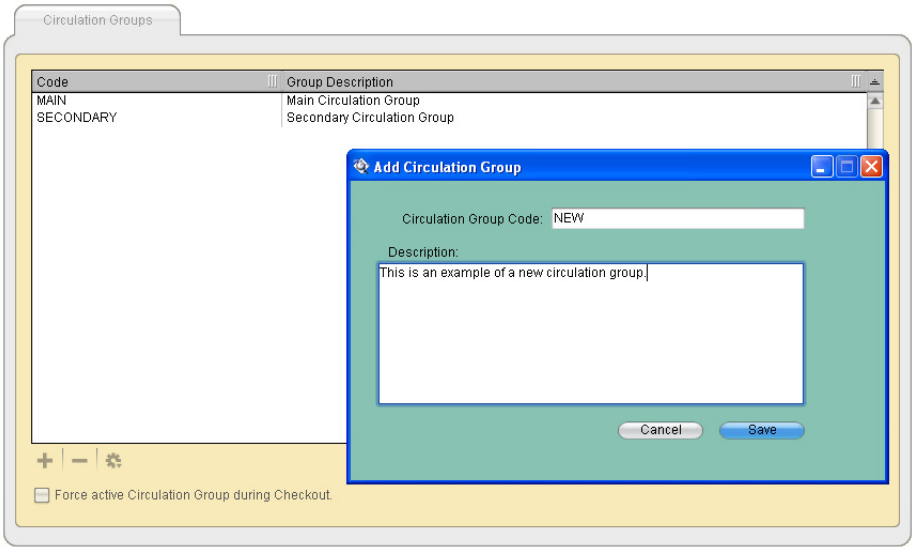
Step 3. Click the **Add Circulation Group** ("**+**") button on the bottom-left of the **Circulation Groups** preference window or <Cmnd+N> on Macintosh, <Ctrl+N> on Windows.

Step 4. The **Add Circulation Group** window will appear.

Step 5. Enter the **Circulation Group Code** and description of the new **Circulation Group** you want to add.

Step 6. Click on **Save** to add or **Cancel** to cancel.

Circulation Groups are used for collecting focused circulation statistics. **Circulation Group Codes** can be eleven characters long. **Circulation Groups** can be activated and cleared on the main **Circulation** window. Clicking on the **Actions** menu will allow you to **Remove**, **Add**, **Edit**, and **Clear All** existing or new circulation groups.



Add Circulation Groups—Opens the **Add Circulation Group** window, allowing you to add a new **Circulation Group** code and description.

Remove Circulation Groups—Allows you to remove the selected (highlighted) **Circulation Group** code and description.

Edit Circulation Groups—Opens the **Edit Circulation Group** window, allowing you to edit a selected (highlighted) **Circulation Group** code and description.

Clear All Circulation Groups—Removes all **Circulation Group** codes and descriptions from the **Circulation Group** list.

Force active Circulation Group during Checkout—If this preference is selected, you will not be able to check out an item without a set **Circulation Group** and a message will be delivered to the **Transaction Log**, stating the reason.

Notes:

Importing Patrons and Items

After successfully installing Textbook Tracker v4 and setting your initial system preferences, your next step is to import your patrons and items.

There are times when you'll want to add information into Textbook Tracker from outside sources (such as MARC records, book vendors, or patron information from a central database). The process of adding information into Textbook Tracker from outside sources is called "importing".

Textbook Tracker supports the importation of patron, item, and transaction command information.

Once an older Textbook Tracker version data file has been imported or rebuilt into v4, it *can not* be downgraded. Therefore, it is *essential* to archive and backup your data prior to installing the v4 upgrade.

Computerized Records

Before we go further, it will help to understand some basic concepts about computerized records. In order to exchange information between different programs (or even between different computer systems), one needs to get the information into a format that many different programs can understand. The standard, called ASCII[1], is widely used to exchange information between different programs and operating systems. Sometimes an ASCII file is called a text file ("`*.txt`") because all it contains is textual information.

ASCII files contain two types of characters: *standard visible characters* such as numbers and letters of the alphabet, and *special characters* that are called **Control Characters**[2]. **Control Characters** are used for special purposes to control the display or interpret the information in the file. If you have computerized data, you may be familiar with the `<tab>` and `<return>` control characters that are used to make text more legible.

When dealing with computerized information systems, you often hear the terms *field*, *record*, and *file*. A *field* is the smallest unit of information stored. An example of a field is a book's title. A *record* is a related group of fields. Many records of the same type saved together are called a *file*. For example, in a *file* of names, a *record* consists of the *fields* "`First Name`" and "`Last Name`". A more complex file may include records with other fields such as "`Phone Number`" and "`Address`". In other words, *records* contain *fields* filled with information, and *files* contain many *records*.

In the library world, there is a fairly well-defined method of exchanging bibliographic information between computers. This format is called **MARC** (for **MA**chine-**R**eadable **C**ataloguing). Another format of the MARC is called **MicroLIF** (for **Micro**computer **Site Information F**ormat). Textbook Tracker has been programmed to recognize both MARC and MicroLIF files automatically during import. Textbook Tracker can also export in both formats.

In addition to importing and exporting MARC and MicroLIF records, Textbook Tracker is capable of importing and exporting files in a **tab-delimited** format. This format can be used to exchange information with other programs that utilize more complex MARC standards. Most database, spreadsheet, and word-processing programs on personal computers support files in a tab-delimited format.

1.American Standard Code for Information Interchange (ASCII).
2.Since **Tab** and **Return** characters aren't visible, they are represented in this guide as `<tab>` and `<return>`.

Tab-Delimited Records

A very common method of exchanging record information between programs is the tab-delimited ASCII file. In the tab-delimited format, fields are separated by the <tab> control character and the end of the record contains the <return> control character.

```
John <tab> Smith <return>
Bill <tab> Jones <return>
My First Name <tab> My Last Name <return>
```

Using tab-delimited patron import files, you can transfer information about patrons stored in other computer systems. For example, a school can use this capability to transfer student information from the school administration computer system into Textbook Tracker (or transfer site information back to the administration system).

Textbook Tracker's Tab-Delimited Import File Format

In Textbook Tracker, we've enhanced the tab-delimited format by adding special information on the first line of the file, used to interpret the data in the file. This first line is called a header because it's at the head (or beginning) of the file. The header allows programs to figure out where the data in the file belongs. Textbook Tracker headers look like this:

```
###*FileCode/FieldCode/FieldCode/FieldCode/ <return>
```

The ###* doesn't mean anything, but is a rather unusual character combination, unlikely to be found at the beginning of most files. If Textbook Tracker discovers ###* at the beginning of a file, it assumes that the file is in a familiar format.

> **- NOTE -**
>
> The Field Code numbers (shown above) don't have any special meaning other than acting as unique identifiers for each of the fields that can be imported or exported.

The header is optional. If it's present, Textbook Tracker will automatically sort and organize the information and place it into the correct, specified fields. If there is no header, Textbook Tracker displays a **Field Mapping** window, which allows you to specify the order and type of data getting imported. A header is automatically created for all export files.

Since the header is automatically created on export, the information can be transferred to another copy of Textbook Tracker and automatically imported without the user knowing anything about the file structure. This makes it easy for central administrators to transfer information to Textbook Tracker operators. In order to be consistent, Textbook Tracker assumes that the first line of any import file is a header. However, it only knows how to process headers in the format stated above.

Some fields allow multiple lines of information (such as patron notes). Any <return> located in a field is converted into the '\' character on export and on import, the '\' character is restored to a <return>. Generally, you don't need to know about this; however, if you were to examine an exported file, you'd see these characters. Also, if you wanted to add a <return> into a file that is getting imported, you can use the '\' character to make it happen.

An Example of an Textbook Tracker Import File

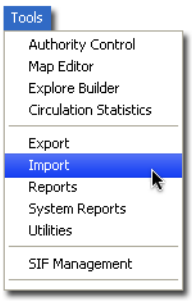
A sample patron import or export file might look like this:

```
###*PT01/1000/1007/1006/ <return>
1100000 <tab> Bill <tab> Smith <return>
1100001 <tab> John <tab> Jones <return>
```

In the example above, the header field codes "1000, 1007, 1006" specify that the fields are ordered by barcode, first name, and last name. An item record will be in a similar format, except that different field codes are used and different types of field information are entered (e.g. title or author of the item).

A simple way to study these formats is to export a few records, then examine the export file with COMPedit, Textbook Tracker's integrated word processor.

If you export from Microsoft Works, you'll notice that Works also places a header at the beginning of its files. The header contains the titles of the columns in the file you've exported. If you want, you can open your export file with Works and replace the Works header with a valid Textbook Tracker header. If you don't do this manually, you'll have to make sure you select the correct fields in the **Field Mapping** window in Textbook Tracker.



Importing Patron Information

Imported patron data can come from any source that provides a *text* file in a *tab-delimited* file format; most word-processing and spreadsheet applications support files in tab-delimited format. In many cases, patron data is available in machine-readable format from your school's office or from the district office. Check with your school or district office to find out how patron data is stored.

For example, you might be able to get patron information from the administrative office student database and import it into Textbook Tracker. When students graduate from elementary to middle school, you can provide patron records that the middle school can import into its Textbook Tracker system.

Another use for export/import is to modify information in a group of records. Patron information can be exported, opened in another computer program, modified, then returned to Textbook Tracker. Sometimes this is much easier than modifying records (one at a time) in Textbook Tracker.

If you have a student information system that can export data on your students in a tab-delimited format, please review the **Patrons** management window *(page 203)* to determine what fields you wish to have included in the export.

Rules for Importing Patron Information

When importing patron records, Textbook Tracker first checks if barcode numbers and ID numbers are being imported. If they are, Textbook Tracker makes sure these numbers are unique and not already in use by another patron.

- Textbook Tracker looks for a header that contains a file designation of "`PT01`[1]" to specify patron information.
  `###*PT01/fieldcode/fieldcode.../ <return>`
- During import, Textbook Tracker attempts to locate an existing record that matches the newly imported record. If an existing Textbook Tracker record is located (and the **Allow Patron Updates** box is checked in the **Patron Settings** tab of the **Data Import** window), the existing record is updated with the imported information. If **Allow Patron Updates** is unchecked, the matching import records are ignored. If no records in the system match, a new record is created.
- In looking for matching records, Textbook Tracker first checks the patron barcode, then the community ID, then the government ID. If no matches exist, the import record is considered a new record. New records are assigned barcodes and policies based on the settings you've selected in the **Data Import** window.
- Textbook Tracker v4 supports Textbook Tracker v3 patron headers for compatibility with older data transfer systems.

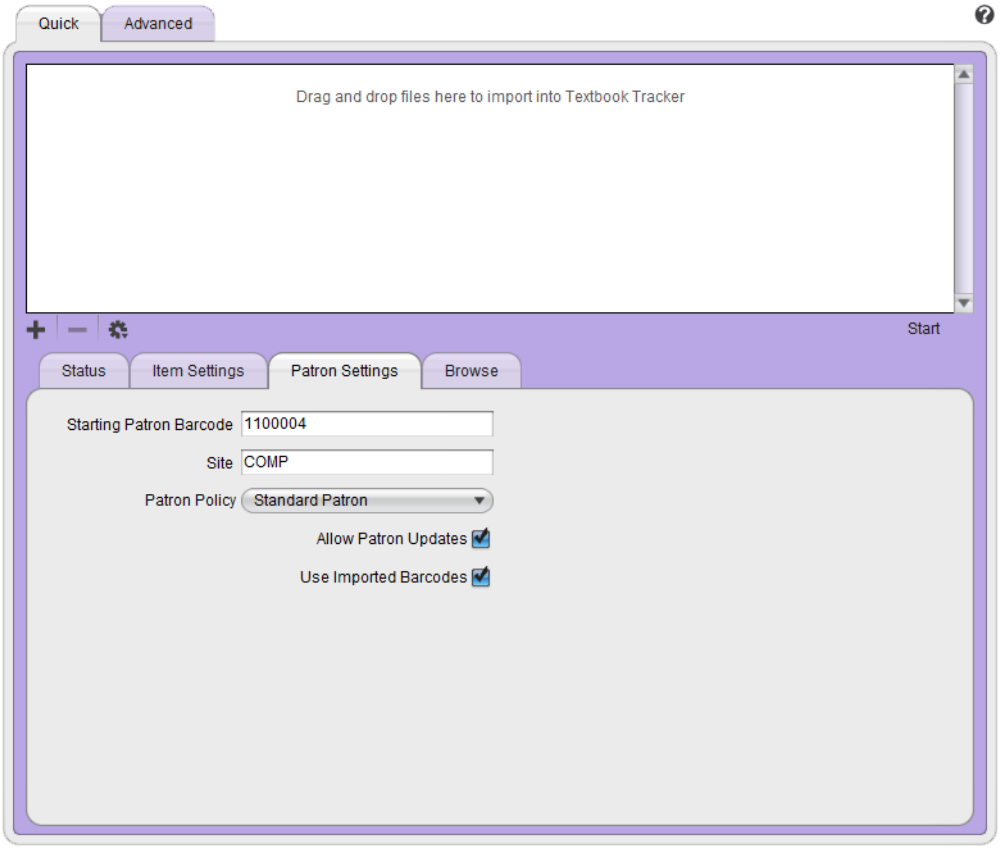
1.The file designator consists of two letters followed by two numbers. The letter will never be an "O" so you can be sure that "0" means zero.

Getting Started: Importing Patron Records

To import patron records:

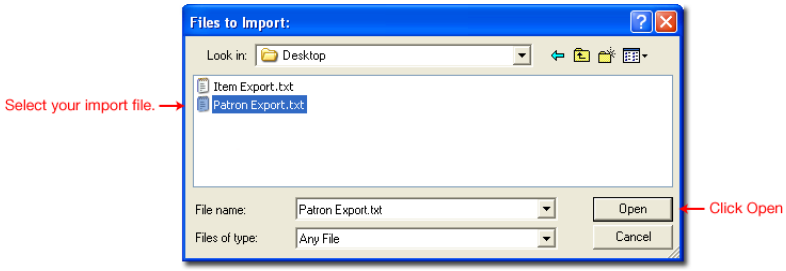
Step 1. Select **Tools** from the Textbook Tracker's main menu bar and choose **Import**.

Step 2. The **Data Import** window will appear.

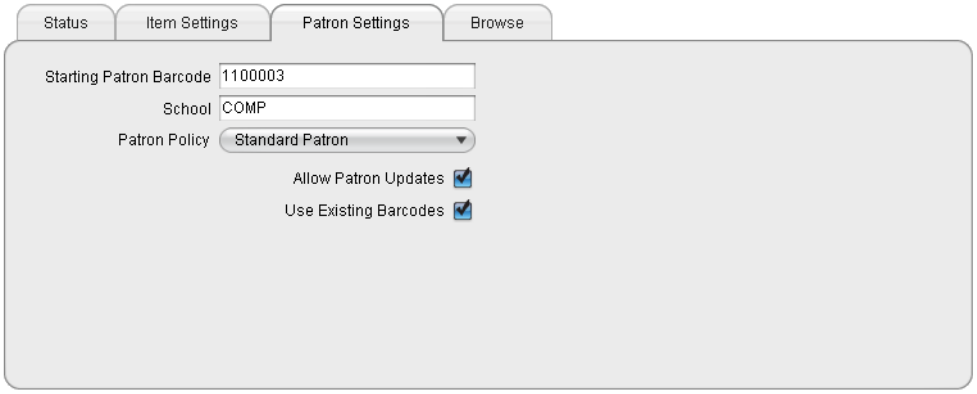


Step 3. Click the **Add** ("**+**") button, located in the bottom-left corner of the **Quick** tab pane; this allows you to place one (or more) import files into the import queue.

- Use the operating system standard explorer window that appears to locate and select the file you want added to the import queue. Once the file has been highlighted, click **Open** to add it to the list. You may also add patron import files by dragging and dropping them into the import file queue.



Click on the **Patron Settings** tab; these settings determine what changes are made to a patron data file on import.



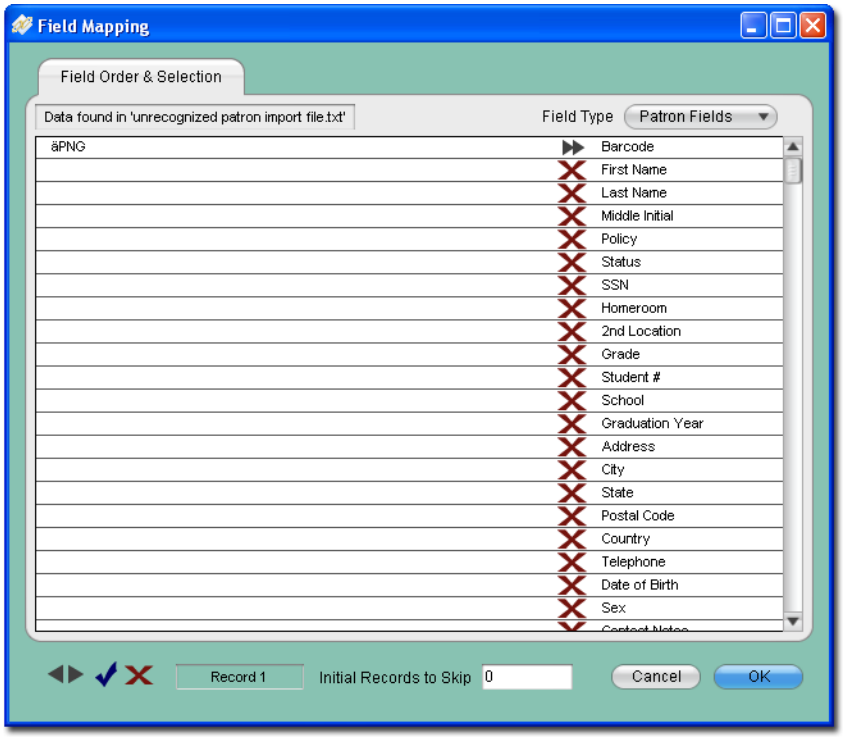
- IMPORTANT -

During import, if Textbook Tracker detects a patron barcode that is less than *three* alphanumeric digits, it will take the **Next Patron Barcode** specified in the **Management** tab of your **Patrons System Preferences** *(page 109)* and assigns that barcode to the patron being imported.

- **Starting Patron Barcode—**If a new patron barcode number is required, Textbook Tracker will begin assigning numbers beginning with this value. Textbook Tracker always checks to see if a value is already in use, and if it is, a new number is automatically selected.
- **Patron School—**If the patron you're importing doesn't have a school defined in their import file, this field will apply a school in their patron record.
- **Patron Policy—**If the patron you're importing doesn't have a policy defined in their import file, this policy will be applied as the default. Default is **Standard Patron**.
- **Allow Patron Updates—**When this box is checked, imported data is used to update existing patrons if specific key fields match. When this box is *not* checked, only new records are added. Default is checked.
- **Use Existing Barcodes—**When this box is checked, barcode numbers found in imported records are used *as is* during import. When this option is not checked, all barcodes are reassigned using your **Starting Patron Barcode** number. Default is checked.

Step 4. Click the **Start** button to begin the patron import. If the patron import file is recognized, Textbook Tracker will automatically sort and organize the information into the correct, specified fields.

Step 5. If the patron import file is *not* recognized, Textbook Tracker will ask you to specify the type of data getting imported. Choose **Patron**. The **Field Mapping** window will then appear so that you may match data in the patron import file to specific Textbook Tracker fields.



Use the **Field Type** drop-down menu to specify **Patron Fields**. The data from the import file is shown on the left of the window. Textbook Tracker field names are shown on the right-hand side.

Use the arrow buttons on the bottom-left of the window to examine different records in the import file. If you want to skip some of the records in the import file, you can specify an **Initial Records to Skip** value. Default is "0".

To adjust the order of the Textbook Tracker fields, highlight and drag the field names. Align the Textbook Tracker field names in the correct order for your imported data. To skip a field, double-click on its line and the arrow will change to a big, red "X". This means that the data for this field is ignored and will *not* be imported.

Step 6. Match the fields with the information from your file. Once the field order has been established, click the **OK** button to import the data. Click **Cancel** to stop importing. Use the **Pause** button to halt the patron import temporarily. Use the **Stop** button to end the import completely. During import, a progress bar is shown in the **Status** tab of the **Data Import** window.

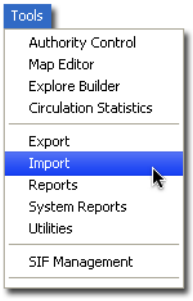
- NOTE -

Special note should be made of the **Full Name** field during **Patron** data import. If you have a patron with a combined first and last name (one that has not been separated by tab delimination), use this field to split the name into **First** and **Last Name** on import.

Patron Fields by Field Number

Barcode	1000	
Community ID Code	1001	
Government ID Code	1002	
Password	1003	
Location	1004	
2nd Location	1005	
Last Name	1006	
First Name, Middle Name/Initial	1007	
Level	1010	
Address	1011	
City	1012	
State	1013	
Postal Code	1014	
Country	1016	
Phone Number	1017	
Fax	1018	
Email	1019	
Contact Notes	1020	
General Notes	1021	
Alert Notes	1022	
Categories	1025	Separate category terms with \
Status	1026	1=Active, 2=Card Lost, 3=Usage Blocked, 4=Transferred, 5=Inactive, 6=Other
Library Code	1027	For multi-collection databases
Policy	1028	Uses policy short code
Previous Policy	1029	Uses policy short code
Total Fines	1030	**Export Only*
Total Payments	1031	**Export Only*
Sex (Gender)	1032	Unknown=0 or U, Male=1 or M, Female=2 or F
Life-to-Date Usage Count	1033	**Export Only*
Number of items currently checked out	1034	**Export Only*

Life-to-Date Overdue Count	1035	**Export Only*
Number of items currently overdue	1036	**Export Only*
Number of items currently on hold	1037	**Export Only*
Current Reservations Count	1038	**Export Only*
In Stock Holds Count	1039	**Export Only*
Reserves Count	1040	**Export Only*
Keep Patron History	1041	Yes or No
Last Use Date	1042	**Export Only*
Last Validation Date	1043	**Export Only*
Next Validation Date	1044	**Export Only*
Birthdate	1045	
Patron Accession Date	1046	
Card Expiration Date	1047	
Optional Date	1048	
Additional Contact (Parent/Guardian)	1049	
3rd Location	1050	
User Name	1052	
Credits	1061	**Export Only*
Unaccepted Credits	1062	**Export Only*
Patron RSN	1099	**Export Only*
In Transit Hold Count	1100	**Export Only*
Patron SIF Info	1200	**Export Only*
Patron SIF Info 2	1201	**Export Only*
Patron Barcode	3000	**Fine Information*
Patron Name	3001	**Fine Information*
Type	3002	**Fine Information*
Description	3003	**Fine Information*
Total	3004	**Fine Information*
Balance	3005	**Fine Information*



Importing Item Information

Textbook Tracker can import item information in industry-standard MARC or MicroLIF format (also in tab-delimited format). Most word-processing or spreadsheet applications support files in tab-delimited format.

The process of taking existing catalog information (usually on catalog cards) and converting the information into a machine-readable format is called retrospective conversion. This process takes time and effort. If you have an existing collection, now is a good time to examine your collection and remove unused and outdated items.

There are several methods of converting your data for Textbook Tracker.

- **Retrospective Conversion:**
  You can hire a retrospective conversion company to create MicroLIF and MARC records for all items in your collection.

  Before sending your shelf list to the conversion company, assign barcode numbers to the items in your collection and record the barcode and other local information on the catalog cards. The MARC records you receive and import into Textbook Tracker will be complete, and you will have no additional data to enter.

  This process can be time-consuming and expensive, but it is the most complete retrospective conversion method available.

- **COMPanion's SmartMARC software:**
  COMPanion offers SmartMARC, a software program that can access hundreds of Z39.50 collections using a standard internet collection. SmartMARC can also be purchased with AccessMARC's database of MARC records. You input minimal information (e.g. title, author, ISBN and/or LCCN) and then SmartMARC searches for MARC records matching that information.

  Once the process is complete, you can add local information such as call number (tag **852_h**), barcode number (tag **852_p**), price (tag **852_9**), item type (tag **949_a**), special funds (tag **852_1**), and volume (tag **092_v**) to your MARC records.

  This process can save many hours of retrospective conversion. If you plan to do your own retrospective conversion, this is the best alternative.

- **Import item records into Textbook Tracker from an outside source:**
  You can import information using any database program that can create a *text* file in a tab-delimited format.

- **Enter the information directly into Textbook Tracker:**
  This direct approach is more time-consuming, but moderately more cost-effective.

Many book vendors offer MARC/MicroLIF records on disk or CD-ROM for the items they sell. Conveniently, Textbook Tracker can read MARC or MicroLIF records directly, saving you the time and energy of typing item information directly into the computer. If you are automating a new site, ask for these records when you order new items.

Rules for Importing Item Information

When importing item records, Textbook Tracker first determines if the item is a new record or an existing record that needs updating.

- Textbook Tracker looks for a header that contains a file designation of "FT01[1]" to specify item information.
  ```
  ###*FT01/fieldcode/fieldcode.../ <return>
  ```
- During import, Textbook Tracker attempts to locate an existing record that matches the newly imported record. If an existing record is located (and the **Allow Title Updates** box is checked in the **Item Settings** tab of the **Data Import** window), the existing record is updated using the imported information. If **Allow Title Updates** is unchecked, matching records from the import file are ignored. If no records in the system match, a new record is added.
- In looking for matching records, Textbook Tracker first checks the copy barcode, then the ISBN, and LCCN. If Textbook Tracker finds an *exact* match for the barcode, ISBN, or LCCN, then the matching record is updated. If the previous check fails, Textbook Tracker then checks for matching title, author, medium, call number, publication year, publisher, extent and volume—if a matching record is located, it's updated.
- For updated records, if the imported record is MicroLIF or MARC and doesn't contain copy information, a new copy is added to the updated record if **Always Add Copies** is selected for **Item Import Settings**.

Textbook Tracker performs an analysis on each and every MARC record imported so that information is correctly imported from a wide number of vendors. If you find records that don't import correctly, send them to COMPanion and we'll reprogram Textbook Tracker to properly import them.

Textbook Tracker correctly imports records from the following sources:

1987 MicroLIF
1991 MicroLIF
US MARC Communication & MARC 21
SunLink, WisCAT
Laser Cat
Dynix, Follett
Canadian MARC
...and many others since the printing of this document.

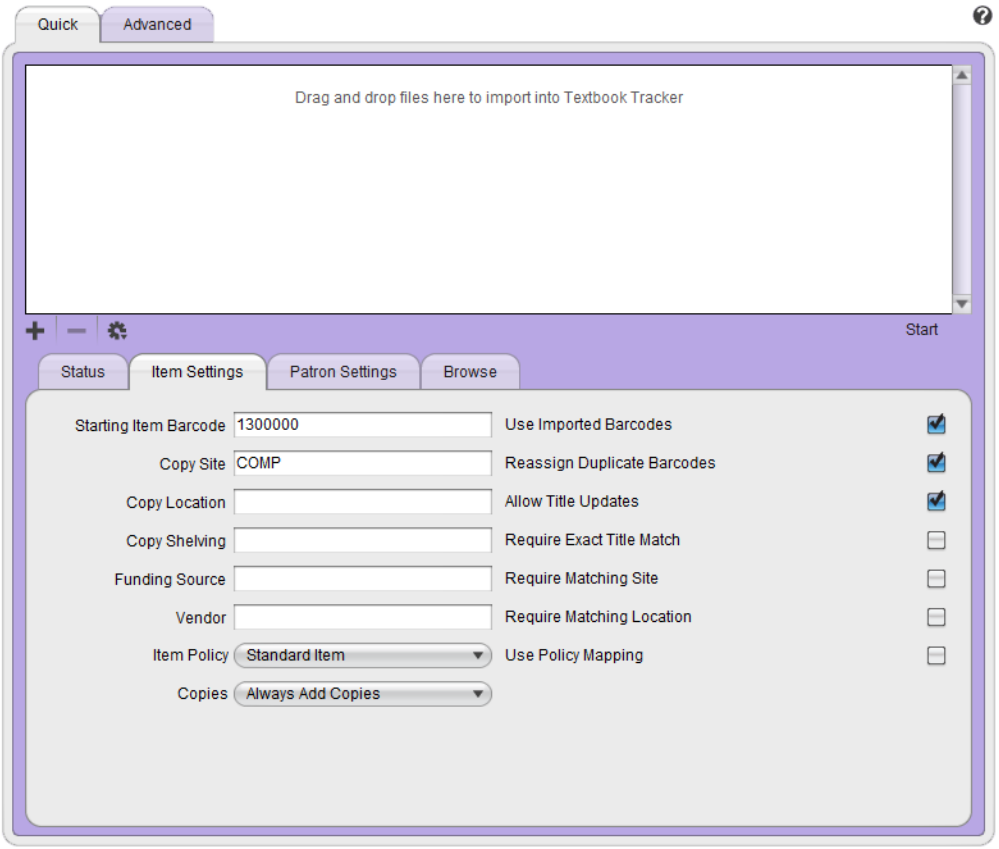
1.The file designator consists of two letters followed by two numbers. The letter will never be an "O" so you can be sure that "0" means zero.

Step by Step: Importing Item Records

Item records may be imported into Textbook Tracker in MARC, MicroLIF, or tab-delimited formats.

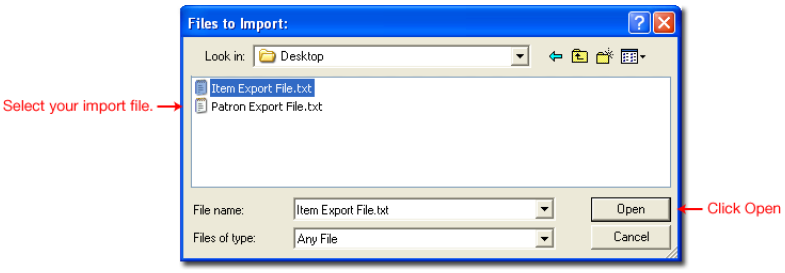
Step 1. Select **Tools** from the menu bar and choose **Import**.

Step 2. The **Data Import** window will appear.

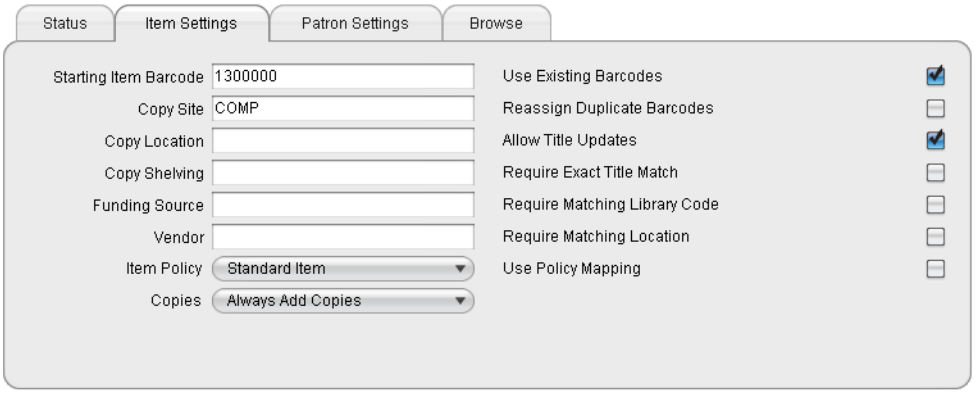


Step 3. Click the **Add** ("**+**") button, located in the bottom-left corner of the **Quick** tab pane; this allows you to place one (or more) import files into the import queue.

Step 4. Use the operating system standard explorer window that appears to locate and select the file that you want added to the import queue. Once the file has been highlighted, click **Open** to add it to the list. You may also add item import files by dragging and dropping them into the import field queue.



Step 5. Click on the **Item Settings** tab; these settings determine what changes are made to a item data file on import.



- IMPORTANT

During import, if Textbook Tracker detects an item barcode that is less than *three* alphanumeric digits, it will pad the beginning of the barcode with *X*'s. For example, if you are importing an item with the barcode of "7", then Textbook Tracker will automatically import it as "XX7".

Starting Item Barcode—If a new item barcode number is required, Textbook Tracker will assign numbers beginning with the value you enter in this field. Textbook Tracker always checks to see if a barcode is already in use, and if it is, a new barcode number is automatically selected.

Copy Site—If the collection code for the record you're importing isn't specified, this collection value will be placed into the **852_a** tag.

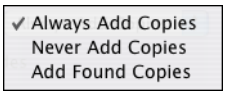
Copy Location—If the location code for the record you're importing isn't specified, this location value will be placed into the **852_b** tag.

Copy Shelving—If the second location code for the record you're importing isn't specified, this location value will be placed into the **852_c** tag.

Funding Source—If the funding code for the record you're importing isn't specified, this location value will be placed into the **852_1** tag under a specially-formatted subfield.

Vendor—If the vendor code for the record you're importing isn't specified, this location value will be placed into the **852_1** tag under a specially-formatted subfield.

Item Policy—If the record you're importing doesn't have an item policy defined, this policy you select from this drop-down menu will be used. Default is **Standard Item**.



Copies—Specifies how copies are managed on import. Default is **Always Add Copies**.

Always Add Copies—When importing, any copies that exist in the import file are imported to either **Add New Copies** or **Update Existing Copies**. If the title record being imported doesn't contain any copies, then a new default copy is added to the imported title record even if Textbook Tracker already has a matching title that has a copy.

Never Add Copies—Copies from imported records are essentially ignored. Only the title information is imported.

Add Found Copies—If you're updating titles and a match is made, add or update the copy as appropriate. If you're not updating titles, simply add a new title for every record imported and add all copies that are included in the import record (there is no matching; any barcodes that are duplicates of barcodes that already exist within your Textbook Tracker database will be reassigned).

Use Existing Barcodes—When this option is selected, barcode numbers found in imported records are used *as is* during import. When this option is unchecked, all item barcodes are reassigned using the **Starting Item Barcode** number (detailed on the previous page).

If you know for sure that your vendor assigned "dummy" barcode numbers with your MARC records, you'll want to turn this option **Off** to force Textbook Tracker to assign new barcode numbers according to your system preferences.

Reassign Duplicate Barcodes—When checked, any barcodes that are duplicates of barcodes that already exist within your Textbook Tracker database will be reassigned.

Allow Title Updates—When this option is checked, imported data will update existing titles if specific key fields match. When this option is not checked, only new records are added.

Typically, you'll want Textbook Tracker to add new copies to existing titles, or use the import function to update brief records. If, however, you want Textbook Tracker to create new title records for each MARC record imported, uncheck this option.

On—If the title or copy data is matched, existing title record is modified (whether that means adding copies or updating copy and title info).

Off—Existing titles are never modified by import. If a barcode matches another, it is reassigned. Title records are added—copies may (or may not be) added.

Require Exact Title Match—When checked, information will only be imported if there is an *exact* title match.

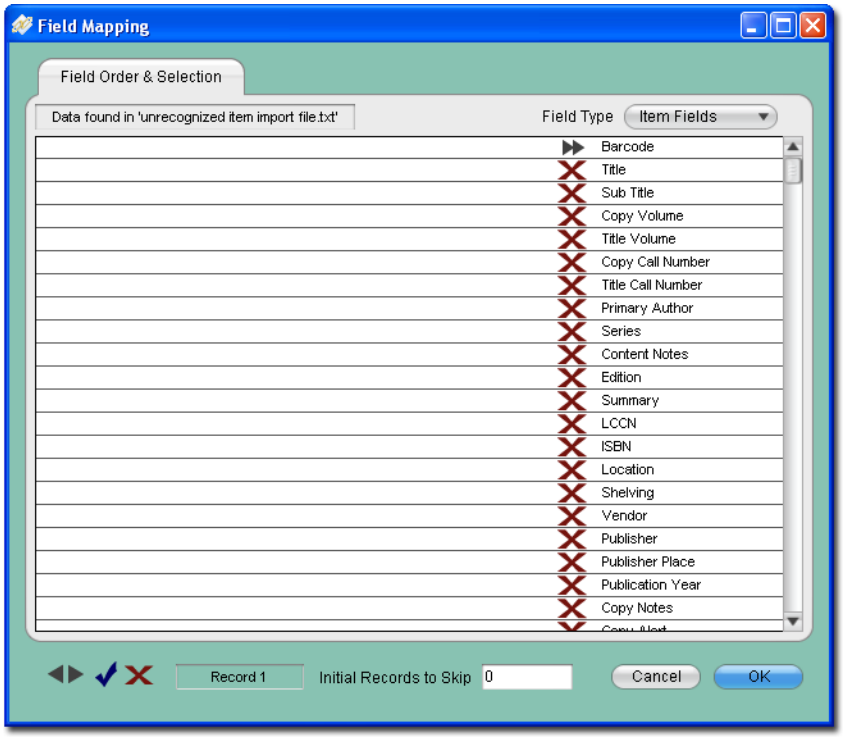
Require Matching Library Code—When checked, copy data is ignored where the **852_a** library code doesn't match the current site identification code specified on the **Site Information System Preferences** window. When there is no **852_a** information, it is assumed to be the local collection code. When unchecked, all copies are imported—no matter what the **852_a** tag contains.

Require Matching Location—When this box is checked, only copy information with your data station's location code (or no location code) is imported. All other site codes are ignored.

Use Policy Mapping—When checked, any call numbers within the call number range specified in your **System Policies System Preferences** window will be assigned to that particular item policy. See your **Policies** and **Call Number Mapping System Preferences** for more information on **Policy Mapping**.

Step 6. Click the **Start** button to begin the item import. If the item import file is recognized, Textbook Tracker will automatically sort and organize the information into the correct, specified fields.

Step 7. If the item import file is *not* recognized, Textbook Tracker will ask you to specify the type of data getting imported. Choose **Item**. The **Field Mapping** window will then appear so that you may match data in the item import file to specific Textbook Tracker fields.



Use the **Field Type** drop-down menu to specify **Item Fields**. The data from the import file is shown on the left of the window. Textbook Tracker field names are shown on the right-hand side.

Use the arrow buttons on the bottom-left of the window to examine different records in the import file. If you want to skip some of the records in the import file, you can specify an **Initial Records to Skip** value. Default is "0".

To adjust the order of the Textbook Tracker fields, highlight and drag the field names. Align the Textbook Tracker field names in the correct order for your imported data. To skip a field, double-click on its line and the arrow will change to a big, red "X". This means that the data for this field is ignored and will *not* be imported.

Step 8. Match the fields with the information from your file. Once the field order has been established, click the **OK** button to import the data. Click **Cancel** to stop importing.

Step 9. Use the **Pause** button to halt the item import temporarily. Use the **Stop** button to end the import completely. During import, a progress bar is shown in the **Status** tab of the **Data Import** window.

Item Fields by Field Number

Barcode	2000	852_p
Copy Last Used Date	2001	**Export Only*
Copy Check Out Count	2002	**Export Only*
Copy Days in Circulation	2003	**Export Only*
Copy Last Modified Date	2004	**Export Only*
Prior Patron Barcode	2005	**Export Only*
Previous Prior Barcode	2006	**Export Only*
Before Previous Patron Barcode	2007	**Export Only*
Inventory Date	2008	852_1
Accession Date	2009	852_1
LCCN	2010	010_a
Replacement Cost	2011	
Purchase Cost	2012	852_9
Current Policy	2013	
Previous Policy	2014	**Export Only*
Copy Status	2015	**Export Only*
Vendor	2016	852_1
Copy Condition	2017	852_1
Copy Notes	2018	852_x
Copy Alert	2019	852_z
ISBN	2020	020_a
Copy Number	2021	852_t
Funding Source	2022	
Copy Collection	2023	852_a
Copy Location	2024	852_b
Copy Call Number	2025	852_h
Copy/Title Volume	2026	852_v
Shelving Field	2027	
ISBN Stock #	2029	
Bibliographic Codes/Keywords	2040	Separated by \
Curriculum Keywords	2041	Separated by \

Don't Show in Textbook Tracker Workstation	2042	Yes or No
Copy Count	2043	**Export Only*
Available for Checkout	2044	**Export Only*
Title Life-to-Date Usage Count	2045	**Export Only*
SmartMARC Matching Score	2046	**Export Only*
Title Accession Date	2047	**Export Only*
First Use Date	2048	**Export Only*
Last Use Date	2049	**Export Only*
Last Modified Date	2050	**Export Only*
Last Modified User ID	2051	**Export Only*
Title Current Policy	2052	**Export Only*
Title Previous Policy Short Code	2053	**Export Only*
Last Validation Date	2054	**Export Only*
Checked Out To	2055	**Export Only*
Title Call Number	2063	
Copy Volume	2064	
Title RSN	2099	**Export Only*
Primary Author	2100	From: 100_a
Full Title	2240	Title: Subtitle—*Export Only*
Title	2245	245_a
Subtitle	2246	245_b
Statement of Responsibility	2247	245_c
Medium	2248	245_h
Edition	2250	250_a
Publisher Place	2260	260_a
Publisher	2261	260_b
Publisher Year	2262	260_c
Extent	2300	Full description—*Export Only*
Physical Description	2301	300_a
Other Physical Details	2302	300_b
Dimensions	2303	300_c
Accompanying Material	2304	300_e

Series Title	2440	830
General Note	2500	500_a
Content Note	2501	
Summary	2520	520_a
Target Audience Note	2521	521_a
Review Source	2522	521_b
District Adoption Start Date	2523	
State Adoption Start Date	2524	
District Adoption End Date	2525	
State Adoption End Date	2526	
Before Previous Patron Barcode 2	2600	**Export Only*
Before Previous Patron Barcode 3	2601	**Export Only*
First Subject	2651	650_a--650_x--650_y--650_z
Second Subject	2652	650_a--650_x--650_y--650_z
Third Subject	2653	650_a--650_x--650_y--650_z
Fourth Subject	2654	650_a--650_x--650_y--650_z
Fifth Subject	2655	650_a--650_x--650_y--650_z
Author List	2700	**Export Only*
Last Library	2756	**Export Only*

Performing Utilities

Getting Started:

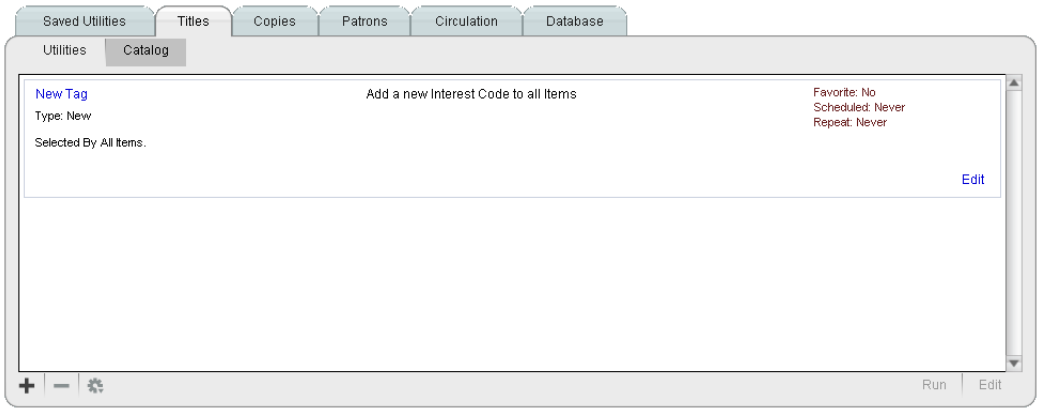
Remember, you must have your **Policies System Preferences** established before you can perform any utilities that migrate items or patrons to a different policy. If you are *ever* encouraged to **Archive** before performing a utility, the correct response is *always* **Yes**.

How to Initiate a Utility

Follow the subsequent steps to perform any general patron/item utility.

Step 1. Using the main tabs that cross the top, select a specific utility category from Textbook Tracker's **Utilities** window (e.g. **Titles** tab).

Step 2. Next, further focus your selection by choosing one of the subtabs located beneath the main tab selection (e.g. **Catalog** subtab).



Step 3. Alternately, you may select the **Saved Utilities** tab followed by the **Available** subtab to get a complete list of Textbook Tracker utilities.

Step 4. If there is an existing utility that you wish to modify or duplicate, select (highlight) it from the list and then choose **Duplicate (Cmnd/Ctrl+D)** or **Edit** from the **Actions** menu.

Step 5. If none of the existing utilities meet your criteria, press the **Add** button ("**+**") to create a new utility.

Step 6. Once the **Editing New Utility** window appears, you'll find yourself on the main **Overview** tab. Use the fields in this tab to **Name** and describe your new utility, including any general notes you wish to add. If you'd like this utility to appear in the **Saved Utilities > Favorites** subtab in the main utilities window, check the **Favorite** box now.

Step 7. In the **Selection** tab, choose the general **Utility Type** and format (e.g. some utilities have a **1-Line** and **Detailed** format).

Step 8. Select a sort order from the **Sort By** field[1]. The **Sort By** order determines the hierarchy of the information processed by the utility (e.g. **Patron Utilities** can be sorted by name, barcode, policy, and other values). Some sort selections sort by two values (e.g. **Patron Lists** can be sorted by **Grade**/**Name**, resulting in patrons being sorted by grade and then by name).

Step 9. Use the **Select By** drop-down menu to select which type of information is to be processed by the utility. You are limited to *five selection ranges* using **And**, **Or**, and **And Not** (Boolean logic) for your utility. In addition, the order the selections are processed are from the top down and will affect the results if you are using both **And** and **Or** operators at the same time.

When you choose values in the selection drop-down menus, other fields may appear and prompt you for required information (e.g. if you select **Due Date** in the **Select By** drop-down menu, **Date Range** fields will appear, allowing you to enter a starting and ending date value).

If you enter only a **Starting With** selection, Textbook Tracker will select all records where the **Grade** begins with the entered text. For example, entering "`GR1`" would select "`GR100`", "`GR10`" and "`GR1B37`".

To do an exact match for a text field range, enter an **Ending With** value that matches the **Starting With** value followed by space and exclamation point. For example, **Starting With** "`GR1`" and **Ending With** "`GR1 !`" (unless you really have data named "`GR1 !`").

Step 10. If you don't want to immediately initiate the utility, you can use the **Schedule** tab to set up a "one-time" or "repeating" utility operation. Provide a valid **Run Next On** and **Repeat** frequency in order to establish a schedule.

Step 11. When you are ready, click the **Run** button at the bottom **Selection** tab to perform the utility; a **Status** window will appear afterward, allowing you to abort the utility by clicking **Cancel**. Note, the **Cancel** button will only stop the utility in its tracks; any records that were modified before you stop the utility will remain modified.

Step 12. While *some* utilities are processing, you may perform other tasks within Textbook Tracker. For example, you may circulate items or prepare a report. Some utility operations execute at lower priorities than other Textbook Tracker processes. Thus, if you run a **Report**, the utility will rest while the report is processing. However, *under no circumstances should you ever do anything* during the **Rebuild** utility.

Step 13. If the **Utilities** window becomes hidden behind other windows, select it from the main **Windows** menu to bring it to the forefront.

Step 14. When the utility is complete, the **Status** window automatically closes and a "utility complete" entry is placed in the **Transaction log**. Most of Textbook Tracker's utilities create entries in the log so you can view which records have been modified.

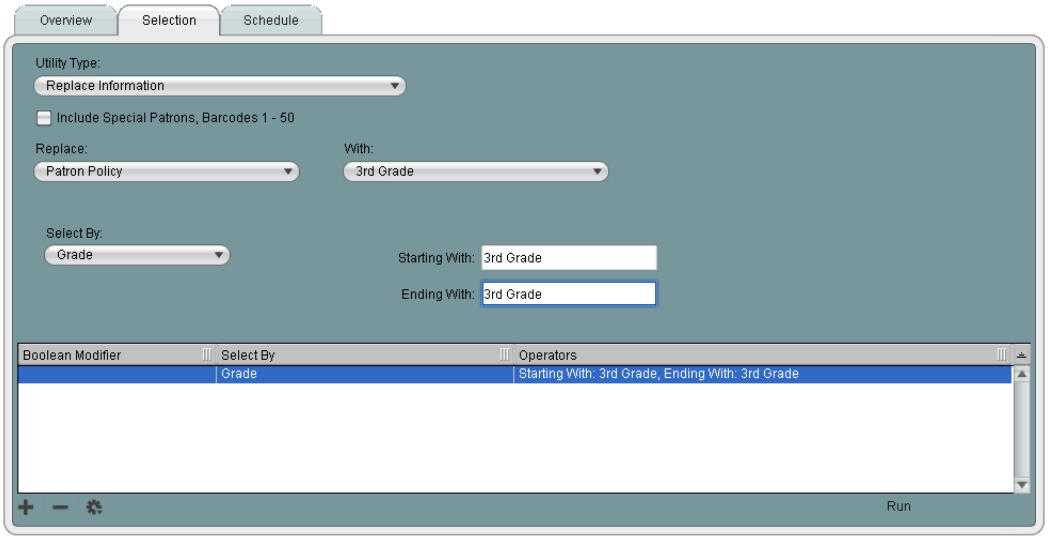
¡ WARNING!

Before you use any **Utility**, you need to **Archive** your data. Thus, if you discover that you've performed an operation that has damaged your data, you can recover from a previous archive.

1.Since Textbook Tracker allows you to customize certain terms for **Patrons** and **Items**, the term names you use may not be reflected in this guide. For purposes of illustration, the sample library we've used in this guide is a School Library and thus Community ID = Patron Number, Location = Homeroom, Level = Grade and so forth.

Moving Patrons to a New Policy

Now that you have set up your new **Patron** policies, you can use **Utilities** to switch your patrons. If your new policies are set up by grade, this will be very easy to accomplish. If you are using some other identifier (e.g. **Homeroom**), find the most common value for those people and use it as your **Select By** criteria. The example pictured below demonstrates how to switch patrons on the **3rd Grade** policy to the **4th Grade** policy using **Grade** as the **Select By** criteria.



To change the default policy for a selection of patrons:

Step 1. Select **Utilities** from the **Tools** menu.

Step 2. Select the **Patrons** tab as the main 'category' selection at the top of the **Utilities** window.

Step 3. Next, choose the utilities 'subcategory' from the subtab menus located directly below.

Step 4. From the **Utility Type** list that appears, click **Edit** in the **Change Patron Policy** utility.

Step 5. Under the **Selection** tab of the **Change Patron Policy** utility window, set the **With** drop-down menu (e.g. **3rd Grade**).

Step 6. Next, set the **Select By** to the desired criteria (e.g. **Homeroom**, **Grade**, **Policy**).

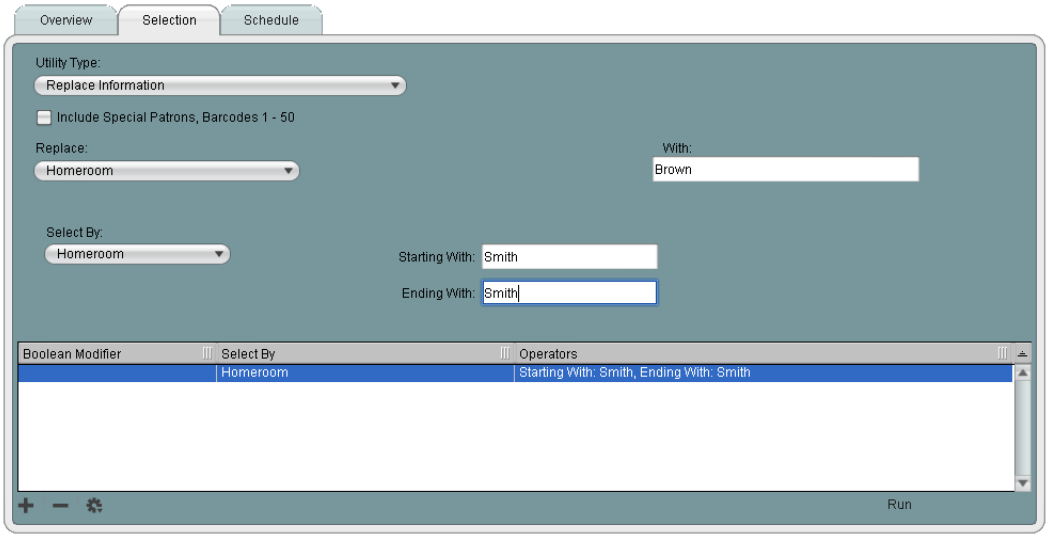
Step 7. Provide the **Starting With** / **Ending With** fields or the **From** / **Through** drop-down menus with the appropriate information (e.g. **Standard** / **System Patrons**).

Step 8. Click on **Run**. Remember, if you are asked whether or not you want to archive, the answer is always **Yes**.

Once you have switched all your patrons to the new policies, statistics will begin to be kept according to the new policies. Prior statistics can not and will not be changed.

Moving Patrons to a New Homeroom

If the patron information you receive from your SIS (Student Information System) does not include the homeroom, use this utility to change the default homeroom for a selection of patrons:



To change the default homeroom for a selection of patrons:

Step 1. Select **Utilities** from the **Tools** menu.

Step 2. Select the **Patrons** tab as the main 'category' selection at the top of the **Utilities** window.

Step 3. Next, choose the utilities 'subcategory' from the subtab menus located directly below.

Step 4. From the **Utility Type** list that appears, click **Edit** in the **Change Patron Homeroom** utility.

Step 5. Under the **Selection** tab of the **Change Patron Homeroom** utility window, enter the name of the homeroom in the **With** drop-down menu (e.g. **Brown**).

Step 6. Next, set the **Select By** to the desired criteria (e.g. **Homeroom**, **Grade**, **Policy**).

Step 7. Provide the **Starting With** / **Ending With** fields or the **From** / **Through** drop-down menus with the appropriate information (e.g. **Standard** / **System Patrons**).

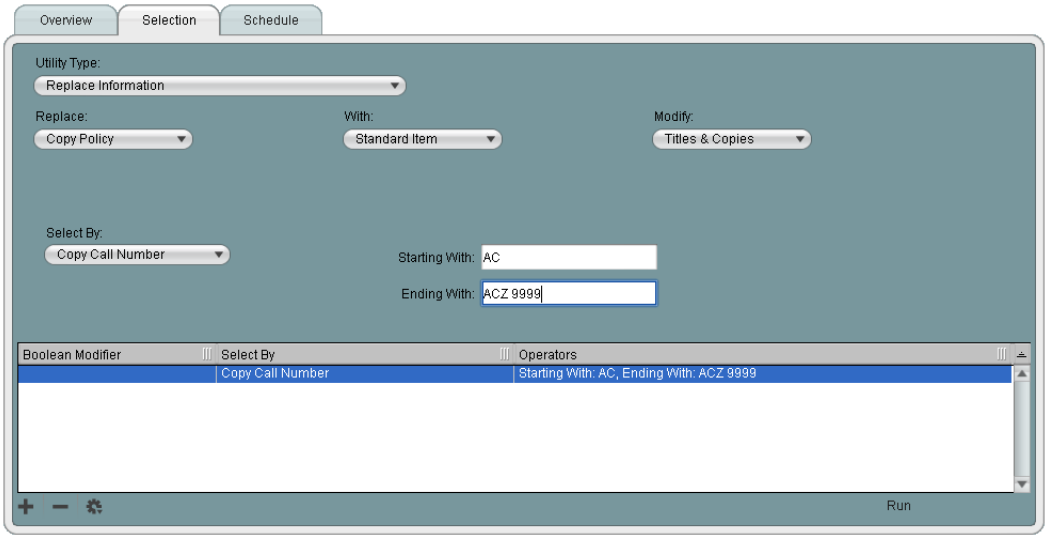
Step 8. Click on **Run**. Remember, if you are asked whether or not you want to archive, the answer is always **Yes**.

Moving Items to a New Policy

Now you are ready to switch your items from the generic **Standard Item** policy to a more specific policy.

This will be quite easy since you've probably used call number ranges or prefixes (such as **FIC**) as the basis for your new **Item** policies. The example pictured below demonstrates how to switch items within a specific call number range to the corresponding policy.

To switch items to a new item policy:



Step 1. Select **Utilities** from the **Tools** menu.

Step 2. Select the **Copies** tab as the main 'category' selection at the top of the **Utilities** window.

Step 3. Next, choose the **Utilities** 'subcategory' from the subtab menus located directly below.

Step 4. From the **Utility Type** list that appears, click **Edit** in the **Change Item Policies** utility.

Step 5. Under the **Selection** tab of the **Change Patron Policy** utility window, set the **With** drop-down menu (e.g. **Non Fiction**).

Step 6. Next, set the **Select By** to the desired criteria (e.g. **Copy Location**).

Step 7. Provide the **Starting With** / **Ending With** fields or the **From** / **Through** drop-down menus with the appropriate information (e.g. **Standard** / **System Items**). For example, if you are doing a Dewey Range, use the beginning call number and the ending call number (e.g. `000 - 099.99999`).

Step 8. Click on **Run**. Remember, if you are asked whether or not you want to archive, the answer is always **Yes**.

Once you have switched all your items to the new policies, statistics will begin to be kept according to the new policies. Prior statistics can not and will not be changed.

Adaptive Dates

An adaptive date can be substituted for an actual date *anywhere* within Textbook Tracker.

Here are the terms you can substitute for an actual date in the Textbook Tracker **Date Range** selection fields:

%today or **%td —** Entering these commands into a date field is the same as entering today's date. For example, if today's date is April 7th, 2010, then entering `%td` or `%today` is the same as entering `4/7/2010`.

%yesterday or **%yd —** Entering these commands into a date field is the same as entering yesterday's date. For example, if yesterday's date was April 6th, 2010, then entering `%yd` or `%yesterday` is the same as entering `4/6/2010`.

%tomorrow or **%tm —** Entering these commands into a date field is the same as entering tomorrow's date. For example, if tomorrow's date is April 8th, 2010, then entering `%tm` or `%tomorrow` is the same as entering `4/8/2010`.

%lastweek or **%lw —** Entering the %lw or %lastweek command will subtract seven days from today's date. For example, if the current date is April 7th, 2010, then entering `%lw` or `%lastweek` is the same as entering `3/31/2010` (March 31st, 2010).

%nextweek or **%nw —** Entering the %nw or %nextweek command will add seven days from today's date. For example, if the current date is April 7th, 2010, then entering `%nw` or `%nextweek` is the same as entering `4/14/2010` (April 14th, 2010).

%lastmonth or **%lm —** Entering the %lm or %lastmonth command will subtract thirty days from today's date. For example, if the current date is April 7th, 2010, then entering `%lm` or `%lastmonth` is the same as entering `3/8/2010` (March 8th, 2010).

%nextmonth or **%nm —** Entering the %nm or %nextmonth command will add thirty days from today's date. For example, if the current date is March 8th, 2010, then entering `%nm` or `%nextmonth` is the same as entering `4/7/2010` (April 7th, 2010).

%lastyear or **%ly —** Entering these commands into a date field is the same as entering today's date, but last year. For example, if today's date is April 7th, 2010, then entering `%td` or `%today` is the same as entering `4/7/2009`.

%nextyear or **%ny —** Entering these commands into a date field is the same as entering today's date, but next year. For example, if today's date is April 7th, 2010, then entering `%td` or `%today` is the same as entering `4/7/2011`.

Also, you are allowed to add or subtract a number of days from each adaptive date selection. For example, `%td - 5` will take today's date and subtract five days. Further, `%tm + 20` will take tomorrow's date and add twenty days.

Introduction to Reports

Set them and forget them!

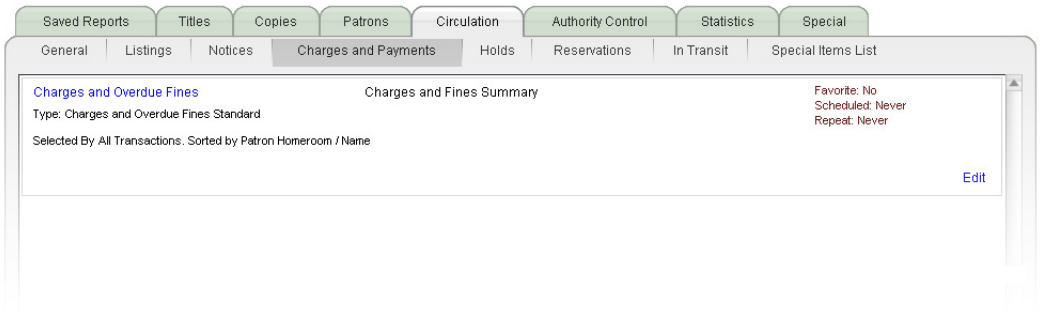
Textbook Tracker's reports were designed with the principle aim to provide general templates that allow operators to create the reports that they are going to use; specific to their school or district requirements. Once created, there won't be a need to adjust the particulars very often.

Reports were created to meet the content, format, and organizational demands of your school, management, department chairs, and others. They can provide true and contextually relevant information that detail account and financial activity, transaction activity, and more. Each report is aggregated into a single COMPedit[1] document, with detailed records that go all the way down to the transaction level.

In order to create new or modify existing reports, select **Reports** from the main **Tools** menu. A window similar to the one shown below will appear.

Across the top of the **Reports** window are several 'category' tabs. These relate to Textbook Tracker's core areas (e.g. **Titles**, **Copies**, **Patrons**, **Circulation**, etc.). Clicking on one of these main tabs displays a subsidiary row of 'subtabs', further narrowing the focus of the report.

For instance, clicking on the **Circulation** tab will display the **Charges and Payments**, **Holds**, and **Reservations** subtabs, among others.



Below the layer of subtabs is a large, white field that may contain several system default and/or user-created reports.

Every report listed in this field will contain a brief summary, including the report type and the reports default **Select** and **Sort By** selections. Also included will be an informational synopsis of how often the report is scheduled to run, repeat, etc. The ability to modify the name, selections, sites, schedule, and locations of each report (even system defaults) is granted by clicking the **Edit** link in the lower-right corner of each report summary or by selecting **Edit** from the **Actions** menu.

Double-clicking on a selected (highlighted) report from the list will immediately run the report.

1.Textbook Tracker's integrated word processor.

Step by Step:

Follow these steps to create your own report:

Step 1. Using the main tabs that cross the top, select a specific report category from Textbook Tracker's **Report** window (e.g. **Patron** tab).

Step 2. Next, further focus your selection by choosing one of the subtabs located beneath the main tab selection (e.g. **Status** subtab).

Step 3. If there is an existing report template that you wish to modify or duplicate, select (highlight) it from the list and then choose **Duplicate (Cmnd/Ctrl+D)** or **Edit** from the **Actions** menu.

Step 4. If none of the existing reports meet your criteria, press the **Add** button ("**+**") to create a new report.

Step 5. Once the **Editing New Report** window appears, you'll find yourself on the main **Overview** tab. Use the fields in this tab to **Name** and describe your new report, including any general notes you wish to add. If you'd like this report to appear in the **Saved Reports > Favorites** subtab in the main reports window, check the **Favorite** box now.

Step 6. In the **Selection** tab, choose the general **Report Type** and format (e.g. some reports have a **1-Line** and **Detailed** format).

Step 7. Select a sort order from the **Sort By** field[1]. The **Sort By** order determines the hierarchy of the information included in the report (e.g. **Patron Reports** can be sorted by name, barcode, policy, and other values). Some sort selections sort by two values (e.g. **Patron Lists** can be sorted by **Grade**/**Name**, resulting in patrons being sorted by grade and then by name).

Step 8. Use the **Select By** drop-down menu to select which type of information is to be included in the report. You are limited to *five selection ranges* using **And**, **Or**, and **And Not** (Boolean logic) for your report. In addition, the order the selections are processed are from the top down and will affect the results if you are using both **And** and **Or** operators at the same time.

When you choose values in the selection drop-down menus, other fields may appear and prompt you for required information (e.g. if you select **Due Date** in the **Select By** drop-down menu, **Date Range** fields will appear, allowing you to enter a starting and ending date value).

If you enter only a **Starting With** selection, Textbook Tracker will select all records where the **Grade** begins with the entered text. For example, entering "`GR1`" would select "`GR100`", "`GR10`" and "`GR1B37`".

1.Since Textbook Tracker allows you to customize certain terms for **Patrons** and **Items**, the term names you use may not be reflected in this guide. For purposes of illustration, the sample library we've used in this guide is a School Library and thus Community ID = Patron Number, Location = Homeroom, Level = Grade and so forth.

To do an exact match for a text field range, enter an **Ending With** value that matches the **Starting With** value followed by space and exclamation point. For example, **Starting With** "GR1" and **Ending With** "GR1 !" (unless you really have data named "GR1 !").

Step 9. If you don't want to immediately initiate the utility, you can use the **Schedule** tab to set up a "one-time" or "repeating" utility operation. Provide a valid **Run Next On** and **Repeat** frequency in order to establish a schedule.

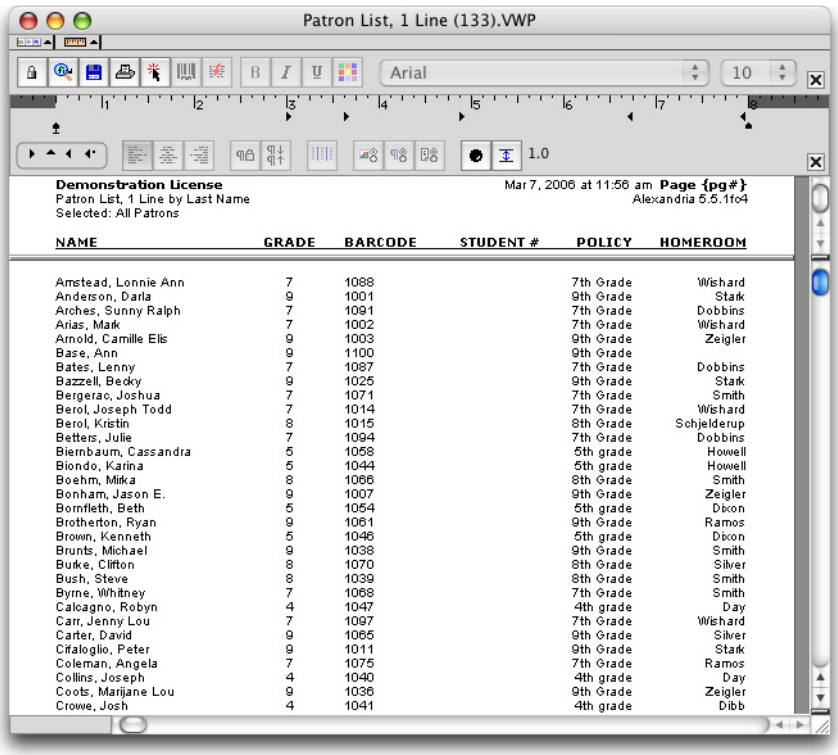
Step 10. Click the **Print** button. As Textbook Tracker builds your report, the status of the report appears at the top of the **Report Results** window.

Step 11. As the report is processing, you can perform other tasks, check items in and out or even prepare other reports within Textbook Tracker. If necessary, click the **Cancel** button to stop the report from processing.

If the **Report** window becomes hidden behind other windows, find it again under the Textbook Tracker **Windows** menu.

When the report is complete, it appears in Textbook Tracker's standard COMPedit word processing window. Since the report is a word processing document, you can:

- View and edit the report on the screen using COMPedit's word processing commands.
- Choose **Save** from the **File** menu to save the report.
- Highlight text in the window and copy it to other programs or onto your desktop.
- Select **Print** from the **File** menu to send this report to the printer. Due to operating system limitations, you may only print one report at a time.


Patron List, 1 Line (133).VWP
Arial
10
Demonstration License
Patron List, 1 Line by Last Name
Selected: All Patrons
Mar 7, 2006 at 11:56 am Page {pg#}
Alexandria 5.5.1fc4
NAME GRADE BARCODE STUDENT # POLICY HOMEROOM
Amstead, Lonnie Ann 7 1088 7th Grade Wishard
Anderson, Darla 9 1001 9th Grade Stark
Arches, Sunny Ralph 7 1091 7th Grade Dobbins
Arias, Mark 7 1002 7th Grade Wishard
Arnold, Camille Elis 9 1003 9th Grade Zeigler
Base, Ann 9 1100 9th Grade
Bates, Lenny 7 1087 7th Grade Dobbins
Bazzell, Becky 9 1025 9th Grade Stark
Bergerac, Joshua 7 1071 7th Grade Smith
Berol, Joseph Todd 7 1014 7th Grade Wishard
Berol, Kristin 8 1015 8th Grade Schjelderup
Betters, Julie 7 1094 7th Grade Dobbins
Biernbaum, Cassandra 5 1058 5th grade Howell
Biondo, Karina 5 1044 5th grade Howell
Boehm, Mika 8 1066 8th Grade Smith
Bonham, Jason E. 9 1007 9th Grade Zeigler
Bornfleth, Beth 5 1054 5th grade Dixon
Brotherton, Ryan 9 1061 9th Grade Ramos
Brown, Kenneth 5 1046 5th grade Dixon
Brunts, Michael 9 1038 9th Grade Smith
Burke, Clifton 8 1070 8th Grade Silver
Bush, Steve 8 1039 8th Grade Smith
Byrne, Whitney 7 1068 7th Grade Smith
Calcagno, Robyn 4 1047 4th grade Day
Carr, Jenny Lou 7 1097 7th Grade Wishard
Carter, David 9 1065 9th Grade Silver
Cifaloglio, Peter 9 1011 9th Grade Stark
Coleman, Angela 7 1075 7th Grade Ramos
Collins, Joseph 4 1040 4th grade Day
Coots, Marijane Lou 9 1036 9th Grade Zeigler
Crowe, Josh 4 1041 4th grade Dibb

Saved Reports

Textbook Tracker makes it very easy to create your own frequently-used reports. Please note that a saved report only saves the specifications that were used to create the report and *do not* save the results of a generated report. However, since all reports are standard word processing documents, you can save the actual report like any other COMPedit document.

The **Saved Reports** tab performs slightly differently than other tabs in the **Reports** window; it contains three subtabs: **Saved**, **Favorite**, and **Available**.

- The **Saved** subtab contains a list of created (or saved) reports. These can be Textbook Tracker system defaults or user-created.
- The **Favorite** subtab contains a list of reports that have been "favorited" by an operator. A particular report can be "favorited" by marking the **Favorite** checkbox in the **Overview** tab in each report's **Edit** window. Once this box is checked, the report will immediately appear in the **Favorite** subtab. If the box is unchecked, it will no longer appear in the **Favorite** subtab.
- The **Available** subtab contains a complete list of available report types, saved or otherwise. If you can't find the report template you are looking for, chances are you will be able to find it here.

Step by Step:

Use the following steps to perform or delete one of the reports you've saved.

Step 1. Select **Reports** from the **Tools** menu.

Step 2. Click on the **Saved Reports** tab followed by the **Saved** subtab.

Step 3. Highlight the report you'd like to perform from the **Saved Reports** list; you can sort this list by **Report Type**, **Report Name** (default), **Report Description**, and **Scheduled**.

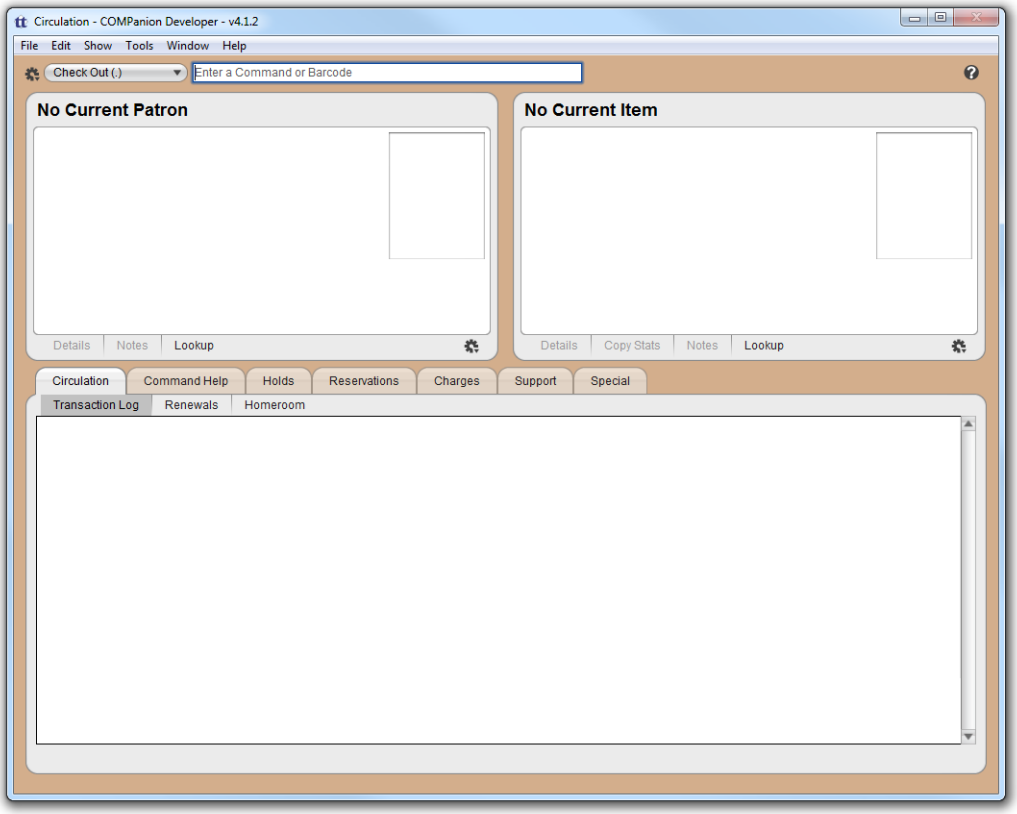
Step 4. Double-click on the report or click **Print** to prepare your highlighted saved report. To remove a **Saved Report**, select it and click the **Delete Report** button.

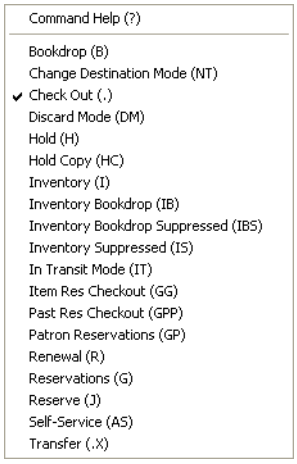
Circulation Window

Use the **Circulation** window (also the main window of the Central Administrator Workstation) to perform site transactions. You can also issue books, place hold requests and reservations, process fees, fines, payments, and renew books. You can also complete special functions such as inventory, cataloging, record updating and viewing.

Use one of the two methods to display the **Circulation** window.

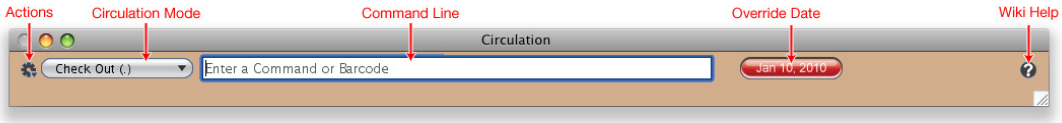
- Select **Circulation** (`Cmnd/Ctrl+T`) from the main **Show** menu.
- Select **Circulation** from the **Windows** menu.


Circulation - COMPanion Developer - v4.1.2
File Edit Show Tools Window Help
Check Out (.)
Enter a Command or Barcode
No Current Patron
Details Notes Lookup
No Current Item
Details Copy Stats Notes Lookup
Circulation Command Help Holds Reservations Charges Support Special
Transaction Log Renewals Homeroom



Modes, Commands and Help

The top portion of the **Circulation** window allows you to select and enter commands that apply to the active mode of the command line.



- A mode is simply a function for which you may want to process many patrons or items. For example, **Bookdrop**, **Check Out**, **Bookdrop**, **Hold**, and **Renew** are all modes.
- The **Command Line** is where you enter a barcode for a patron or item, or you may enter a command. If you enter *only* a barcode, the current mode (shown to the left of the command line) will determine the action that is performed.
- Click the round **Help** ("?") button at the top of the **Circulation** window to open your default web browser to the main page of Textbook Tracker's online **Wiki Help**. If you don't have an internet connection, an offline version of **Help** can be activated (if installed on your system). Offline **Help** documents are installed in the **Help** folder inside your **Textbook Tracker folder**. To get the latest offline **Help** files, please contact Textbook Tracker's 24-hour Technical Support team.

Current Patron and Current Item Information

Just below the top portion (see "**Modes, Commands, and Help**" on the previous page for more information) of the **Circulation** window is where general information about the current patron and current item is displayed.

- NOTE-

Many Textbook Tracker functions depend on the current patron or item. For example, you must have a current patron to check out, hold, or reserve an item.

- If available, click the **Details** button in the current patron or item section to view detailed information about the patron/item. You can also select **Show Patron Details** or **Show Item Details** from the **Actions** menu to view the same information as the **Details** button(s).
- If available, click the **Notes** button in the current patron or item section to view notes entered for a particular patron/item. You enter the notes for a patron in the **Notes** tab of the **Patrons** management window *(see page 203)*. You enter notes for an item in the **Copy Notes** tab of the **Items** management window *(see page 187)*.

Using the Circulation Window

This section describes how you perform basic operations in the **Circulation** window to complete transactions in your site.

Using the Command Line

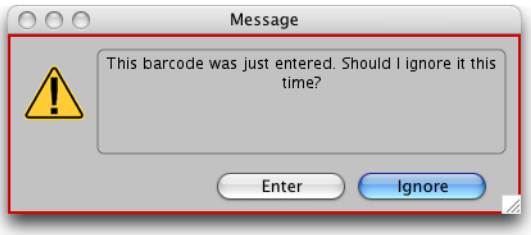
There are several ways to use the command line.

1) Enter a barcode.

You may enter a barcode manually by typing the number and then pressing `<enter>`, or you may scan a barcode using a barcode reader.

When you enter a barcode, the action that takes place depends on the current mode (which is displayed to the left of the command line). For example, if your current mode is **Check Out (.)** and you enter barcode "`13456`", item 13456 is checked out to the current patron.

If you enter the same barcode number twice in a row, this warning message appears.



- NOTE -

When you enter barcodes via portable readers, Textbook Tracker will ignore duplicate entries that appear side by side.

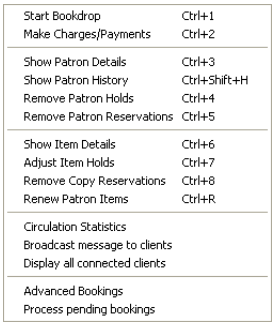
- **Enter a command and a barcode.**
  For actions other than those displayed in the mode field, enter a command followed by the barcode and press `<enter>`. Doing so will apply that action to the individual barcode you enter. It does not change the mode. Therefore, if you're in **Check Out (.)** mode, entering the command of "`B 13456`" performs a bookdrop for item 13456.

- **Enter a command without a barcode.**
  If you enter a command without a barcode, the current mode will change. For example, if you enter "`H`" and press `<enter>`, the mode is set to **Hold**. You can then enter (or scan) a barcode for each item that you want placed on hold for the current patron.

- SHORTCUT -

An equal sign "=" is used as a shortcut for the current item barcode. For example, if you have a current patron, "`H=`" will place a hold on the current item.

Using the Actions Menu



Additional circulation commands are available from the **Actions** menu(s). These menus appears throughout the **Circulation** window. You can either select a command directly from these menus or use the hot-keys (located in the right-hand column of the **Actions** menu) to execute commands.

Some of the commands in these menus require a current patron or current item. For example, you must have a current item to select **Copy Status**.

The **Actions** menu(s) show available commands in bold text. For example, if the current patron does not have any reserves, the **Remove Patron Holds** and **Remove Patron Reservations** selections are grayed-out in the menu and therefore, non-selectable.

The following commands are available in the **Actions** menu:

Start Bookdrop (Cmnd/Ctrl+1)—Sets the current mode to **Bookdrop**. In **Bookdrop** mode, you enter barcodes for items you want to check in. This option will toggle between **Start Bookdrop** and **Start Check In/Out** mode.

Start Check In/Out (Cmnd/Ctrl+1)—Sets the current mode to **Check Out**. This menu will toggle between **Start Bookdrop** and **Start Check Out** modes.

Make Charges/Payments (Cmnd/Ctrl+2)—Opens the **Charges** tab on the **Circulation** window; you may add or remove fines, accept payments for fines incurred, and issue refunds for payments made. You must have a current patron to select this item.

Show Patron Details (Cmnd/Ctrl+3)—Shows the current patron's complete details; including all transactions, fines, requests, and so forth. You must have a current patron to select this option. Performs the same function as the **Details** icon.

Show Patron History (Cmnd/Ctrl+Shift+H)—Shows the current patron's complete history; including all transactions, fines, requests, and so forth. To select this option, you must have a current patron who has the **Keep Patron History** (**Statistics** tab) box checked in their patron record.

Remove Patron Holds (Cmnd/Ctrl+4)—Opens the **Holds** tab on the **Circulation** window and shows which items the current patron has on hold. You must have a current patron with hold requests to select this item.

Remove Patron Reservations (Cmnd/Ctrl+5)—Opens the **Reservations** tab on the **Circulation** window and shows items with reservations pending for the current patron. You must have a current patron with reservations to select this item.

Show Item Details (Cmnd/Ctrl+6)—Shows the current item's complete details; including the status for all copies of that title. You must have a current item to select this command. Performs the same function as the **Details** icon.

Adjust Item Holds (Cmnd/Ctrl+7)—Shows all patrons who have hold requests for the current item. You can remove a request from the queue or change its order. You must have a current item with hold requests displayed to select this item.

Remove Copy Reservations (Cmnd/Ctrl+8)—Shows all forward reservations for the current item. To remove reservation requests, click on the reservation and click on **Remove Reservation**. You must have a current item with reservations to select this item.

Renew Patron Items (Cmnd/Ctrl+R)—Shows everything currently checked out to the current patron. Either click on the **Renew All** button to renew all items or highlight certain items to renew and click the **Renew** button. The current patron must have items checked out.

Broadcast Message to Clients—A query window will appear with a text box for entering and sending messages to other Workstations connected to the Data Station. This message will only appear to currently-connected clients.

Display All Connected Clients—Lists, in the transaction log all the Workstations that are currently connected to your Data Station. The type of client and the machines' IP address are visible in the log.

Advanced Bookings—Every day that reservations begin, the administrator should select the **Advanced Bookings** option from the **Circulation** menu.

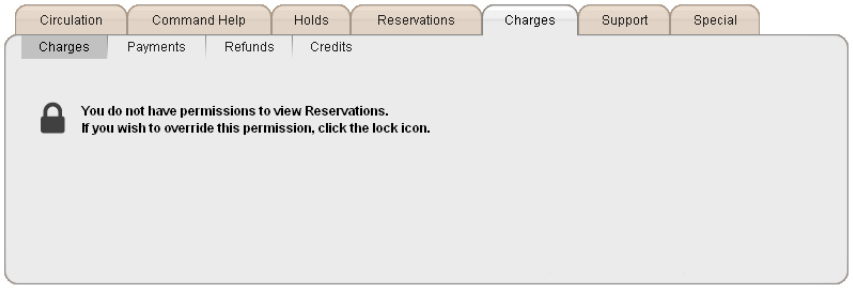
Process Pending Bookings—When you select the **Process Pending Bookings** menu option, Textbook Tracker checks to see if any of the unavailable items have recently become available. If they have, they're automatically assigned to the requesting patron.

Circulation Window Tabs

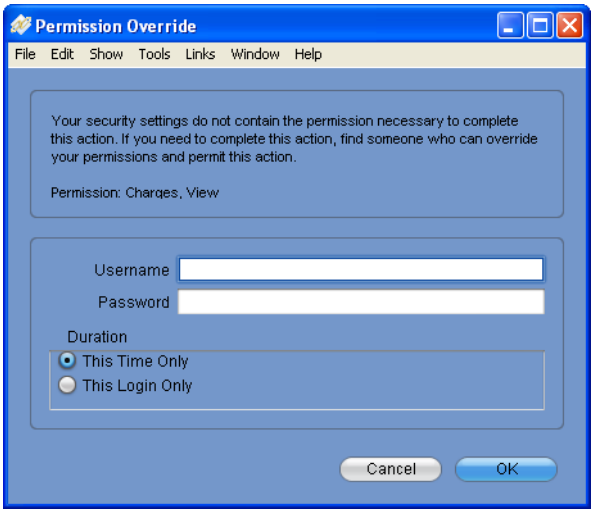
The bottom half of the **Circulation** window contains a series of tabs that are helpful for daily circulation activities and the management of your collection information *(these are discussed in more depth on the "Circulation tabs" section of the Textbook Tracker Online Wiki)*.

Permission Override

If the operator who is currently logged into Textbook Tracker doesn't have the proper authority to change or access the options within a particular **Circulation** tab, then the **Permission Override** lock icon and a brief description (as shown below) will appear.



To override the current operator's permissions, click on the lock icon. Doing so will open the **Permission Override** window. When the **Permission Override** window appears, you are required to input an appropriate **Username** and optional **Password**[1] in order to access Textbook Tracker as the new operator.


Permission Override
File Edit Show Tools Links Window Help
Your security settings do not contain the permission necessary to complete this action. If you need to complete this action, find someone who can override your permissions and permit this action.
Permission: Charges, View
Username
Password
Duration
This Time Only
This Login Only
Cancel
OK

1.If a password was not supplied when creating a new user in the **Add Operator** window *(page 113)*, then this field will not be required.

If you are the Textbook Tracker operator without the necessary security permissions to complete a required action, you must find someone who has the authority to override your permissions and who is willing to permit the action.

From the **Duration** section of the **Permission Override** window, choose the duration of the user override. You can override the specific action for one time only, or for the duration of the current login.

This Time Only—Checking this radio button will allow the operator to enter the otherwise locked Textbook Tracker function for *one time* only. The moment that the operator exits the window, the function will be re-locked and the lock icon will reappear the next time the current operator attempts to access this feature. For example, if you allow your operator to access Textbook Tracker **Charges** using the **This Time Only** option, then they won't be able to open the **Charges** tab again after it has been closed.

This Login Only—Checking this radio button will temporarily unlock the specified Textbook Tracker function for the current operator's entire session. The selected window will remain unlocked until the next time Textbook Tracker is restarted. For example, if you allow your operator to access Textbook Tracker **Utilities** using the **This Login Only** option, then operators will be able to access the **Charges** tab (even after this tab has been closed) for the duration of the current operator's login.

After you have input your username, optional password, and specified a duration, click **OK** to access Textbook Tracker.

The username that was used to override the permission will be recorded to the **Transaction log**.

Special/System Patrons

There are several *special* patrons that Textbook Tracker uses to track items with a special status, such as lost, discarded, or on-order. For example, to track items that have been lost, you can check them out to the **Lost Copies** (barcode #1).

Special patrons use the **System** policy, which has no restriction on the number of items that may be checked out at one time. You can check items out to special patrons just as you would with any other patron.

Here are Textbook Tracker's *special* patrons:

Lost Copies (barcode 1)—To keep track of items that have been lost, check them out to this patron. Unlike other items, an item that is checked out to the **Lost Item** patron does not have its inventory date renewed. If the item is ever found, simply check it in and it's available for circulation again.

If an item is already checked out a *real* patron, checking it out to the **Lost Item** patron causes a window to appear so you can charge a fine to the patron who has lost the item. The lost item will appear on several patron status/details reports.

Although you may permanently remove an item from the Textbook Tracker system when it's lost, lost items are quite often found again later. Checking an item out to the **Lost Item** patron makes it easier to return it to the system because you simply check the item back in when it's found.

Using the **Lost Copies** patron also makes it easy to keep track of which items have been lost so you can order new copies.

There are **Utilities** available to remove lost items according to your policies and the criteria you select.

Discarded Copies (barcode 2)—To track items in the collection that are not circulated, but have not yet been permanently removed, check them out to this patron. To return a discarded item back to "in-stock," simply check it in.

To permanently remove discarded items, use the corresponding **Item Utility**.

For more information on checking items out to the **Discarded Item** special patron, please review *(page 183)* of this guide.

For Library Use (barcode 3)—To keep items available for use *only* within the school, check the items out to this patron. For example, you may want to keep holiday books available in the school and not allow them to be checked out during the holiday season. Check these items out or place a reservation on them using the **For Library Use** patron.

On Repair (barcode 4)—To keep track of items sent for repair and not available to patrons, check them out to this patron. When the item has been repaired and returned, check them in to make them available again.

On Order (barcode 5)—To keep track of items on order, add them to your collection immediately after you place your order and then issue them to this patron. Enter an override date that matches the scheduled delivery date for these items. When you receive these items, check them in to make them available.

Archived Copies (barcode 6)—To archive certain items and make them unavailable to patrons, check them out to this special patron. For example, issue items to this patron if they are kept in a special room and not generally available for circulation.

In Processing Patron (barcode 7)—To keep track of items you've received, but are not ready for circulation (e.g. they are still processing into the system).

Unknown Patron (barcode 8)—Used for items with special circumstances or whose status you do not know (e.g. items on display, set aside, or temporarily misplaced that you know aren't permanently missing).

In Transit (barcode 9)—To keep track of items that are in transit, assign them to this patron. When you receive these items, check them in to make them available.

Reasons For Creating Your Own Special/System Patrons

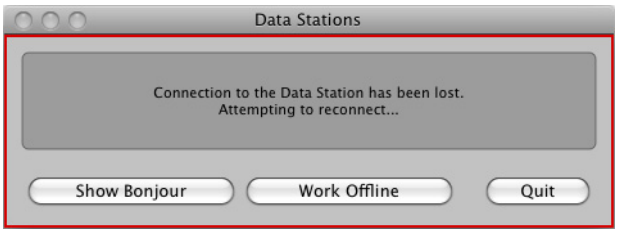
You can create and remove your own *special* patrons to track items with a unique status as needed for your school. Use barcodes 30-50 for special patrons (barcodes 20 and under are exclusively reserved for COMPanion use). These patrons are assigned the **System** policy, which does not restrict the number of items they can check out.

The following are examples of uses for special patrons you create:

- Instead of using the **For Library Use** patron to reserve holiday books, create a Interlibrary Loan patron and check out seasonal books to this patron.
- Instead of using the **On Repair** patron, create a special patron for each vendor that repairs your items. When you send an item to that vendor, check it out to them for the period of time they will have the item.
- Instead of using the **On Order** patron, create a special patron for each vendor from whom you order items. When you order items from that vendor, check them out to that vendor and enter an override date that matches the scheduled delivery date.

Offline Mode

Textbook Tracker v4 contains an **Offline Mode** for Workstations. Textbook Tracker's **Offline Mode** offers additional peace of mind for administrators when things go wrong, such as a network failure, especially in systems where longer network distances make failure more feasible.

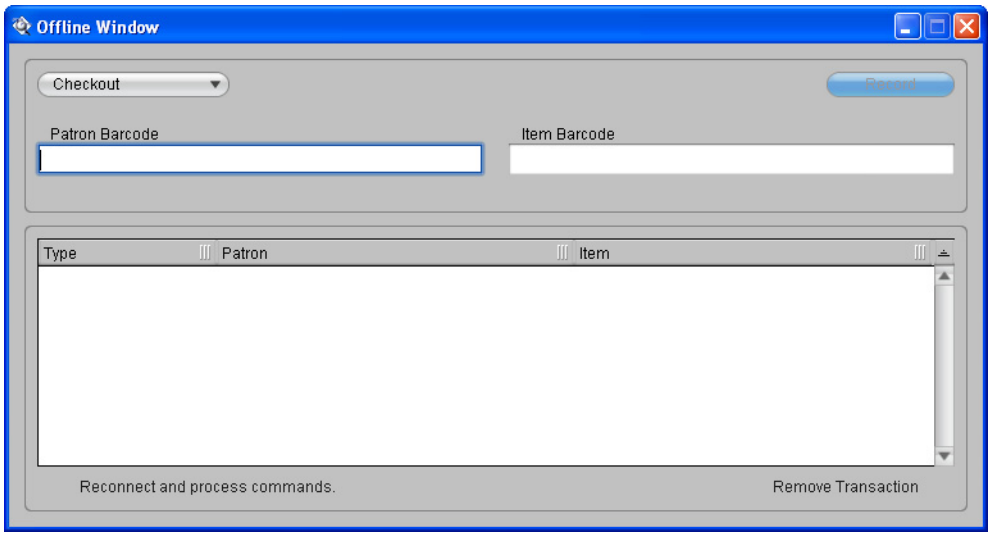


When the Workstation notices that it has lost communication with the Data Station for any reason, a pop-up window appears, informing the user that its connection has been terminated; this can occur during launch or during regular operation.

This window will allow the user to either **Quit** so that they may try again later when communications are re-established or **Work Offline**.

If the user chooses to enter **Offline Mode**, the Workstation will transform itself into an entirely different application. The Workstation will remain in this mode—a greatly simplified version of the main **Circulation** window—until communications are re-established.

The **Offline Window** allows the user to perform just a few "safe" procedures: **Check in**, **Checkout**, and **Inventory**. Menu commands are disabled to block any external access outside of the **Offline Window**; the transaction log remains, although little is displayed—without a connection to the Data Station, there is no way for the Workstation to identify the current item/current patron from the barcode.



However, to reduce potential errors during offline operation, the **Offline Window** allows users to specify what they are scanning/entering by supplying a **Patron/Item** entry line and a command drop-down menu (**Check in/Checkout/Inventory**).

The **Checkout** mode is the only selection that allows the **Patron Barcode** field; the **Check in** (i.e. **Book Drop**) and **Inventory** modes do not require patron record information.

As transactions are entered into the **Offline Window**, they are put in a separate **Offline Transactions** log, stored in an **Offline Transactions** file, kept in the main **Textbook Tracker Support** folder. This log is accessed for information when moving back to normal online operations.

When the main Data Station is detected again, the **Offline Window** informs the operator and allows them to exit **Offline Mode**. As they exit **Offline Mode**, the Workstation looks through the **Offline Transactions log** and sends outstanding commands to the Data Station as if the user had imported them using the existing **Import Transaction Script** utility.

As transactions are processed, they are removed from the **Offline Transactions log**, until there are none remaining. Transactions will be moved to the standard Textbook Tracker **Transaction log** as they are processed while unprocessed transactions remain in the **Offline Transactions log** in case the Workstation loses communications with the Data Station during the procedure.

Circulation Commands

Circulation Command Basics

When typing (rather than scanning) barcodes, always follow the barcode with an <enter>.

Make a Patron Current

Command: `P {patron barcode}`

Make a Patron Current—Use this command to make a specific patron the current patron. For example, to make a student with the barcode 100 the current patron, enter "`P100`". This command is useful if you have an overlap in patron and item barcode numbers. Unless you specify otherwise, Textbook Tracker will *always* check the item barcodes before the patron barcodes. Therefore, if you enter the patron barcode on the command line or use the "`X {barcode}`" command, Textbook Tracker will find the item rather than the patron

If a patron barcode is the same as an item barcode, you must always put a "`P`" in the command line before scanning the barcode. However, COMPanion *strongly recommends* that you change either the patron or item barcode to circumvent this conflict.

Make Item/Patron Current

Command: `X {barcode}`

Make a Patron or Item Current—Use this command to make an item (with patron barcode) the current item/patron. For example, "`X100`" makes a patron with the barcode 100 the current patron and "`X110034`" makes an item with barcode 110034 the current item. If you enter an "`X`" without a barcode, current item and patron are cleared and the main **Circulation** window is restored to **Check In/Out** mode.

Check Out (.)

Textbook Tracker makes it easy to check items in and out. Textbook Tracker automatically determines whether a barcode you enter belongs to a patron or an item and whether that item is already checked out. Because of this, Textbook Tracker can usually determine the appropriate course of action.

In addition, while you are performing transactions, Textbook Tracker automatically computes due dates, adjusts for closed dates, verifies policies, and collects statistics.

> **- NOTE -**
>
> You can use the equal sign as a substitute for the barcode of the current item in *any* command. For example, if the current item is 3000, then "`H=`" is the same command as `H3000`.

Step by Step: Checking Items Out

Use the following steps to check an item out.

Step 1. Make sure the **Mode** is set to **Check Out** (`.`).

Step 2. Scan (or type) the barcode of the patron who is about to check an item out. This makes the patron current. If you do not know the patron's barcode, use the lookup command to find the patron and their barcode *(see page 174)*.

Step 3. Respond to any circulation alert messages that appear.

Step 4. Textbook Tracker calculates the item due date based on your **Policies**. To enter a different due date, use the **Set Override Date** command *(see page 172)*.

Step 5. Scan (or type) the barcode(s) of the copy(s) you want to check out to the current patron. As you check items out, they become current and appear on the **Circulation** window; a line will be added to the transaction log to show what items have been checked out.

Special Conditions When Checking Out Items

What the **Check Out** mode does depends on two things: the **Check Out Options** preference (which allows you to change the behavior of **Check Out** mode; see page 81) and the status of the patron and the item. If the item is available, it will be checked out to the current patron when scanned. If the item is already checked out to the current patron, it will be checked in when scanned. If the item is currently checked out to a different patron, a message will appear, allowing the operator to either check it in from the other patron and out to the current patron or leave it checked out to the other patron.

As you are checking items out, Textbook Tracker will alert you to special conditions that may affect circulation.

For example, if you enter a barcode for a book that is already checked out, a warning message will appear. You can choose to check this book in, or cancel the request to check it out.

If checking an item out to a patron violates a set policy, Textbook Tracker will alert you. For example, if a patron exceeds the number of items they can check out or exceeds the overdue limit, a warning message will appear. If more than one policy setting is violated, the messages will appear in a single window.

If you have the authority to override policies, the window will include the **Override** option. You can allow the patron to check the item out (even though it exceeds the specified limit) or cancel their request to check it out. If you don't have the authority to override policies, a warning message will appear, and you are left *without* the ability to override or check out the item to the patron.

If you decide to check the item in instead of overriding the policy problem, the item will still be checked in.

If the item barcode you enter is not assigned to an existing item (and is not in the temporary barcode range defined in your system preferences), the **Unknown Barcode** window appears.

You can choose **Ignore Barcode** if you entered it incorrectly, or you can add the item "on the fly".

If a copy is designated as an in-stock hold for another patron, an error message will appear. If you have the authority, **Cancel** / **Override** buttons will appear at the bottom of the window. Clicking **Override** will check the copy out to the current patron and place the student with the in-stock hold back at the top of the hold queue. If you don't have any authority, no override options will be available and item checkout will be denied.

Step by Step: Checking Items In

Use the following steps to check an item in:

Step 1. Scan (or type) the barcode of the item you are checking in. If you are checking-in a great number of items, use the **Bookdrop** mode described on page 173.

Step 2. If the item is already checked out to the current patron, it will be checked in (upon verification) when scanned.

Set Override Due Dates

Command: `.{date}`

Set an Override Date—Typically, due dates are computed based on the policies you define in your **System Preferences**. You can use this command to set different due dates for items you are checking out, bookdropping, or performing inventory on. For example, to set the due date to June 3, 2012, type "`.Jun 3 12`" (including the period) and press `<enter>`.

Until you clear or reset the due date using either "`.`" or "`x`", the following changes will be performed:

- The **Override Date** you set is shown to the right of the command line.
- An entry will be made to the transaction log, documenting that this date was manually set.
- Books you check out will be due on June 3, 2012.
- When you bookdrop, the system will record the book as having been checked in on June 3, 2012.
- When you perform inventory, the inventory date used will be June 3, 2012.
- When you are in **Statistics** mode, this date is used.

The **Override Date** you set is in effect until you clear it. To clear an **Override Date**, type a period into the command line without a date. The "`.`" command will also clear any special modes (such as **Bookdrop** or **Inventory**) that were in effect. The period command "`.`" without a date is a quick way to reset the **Circulation** window to **Check Out**.

Checking out items under an **Override Date** forces them to be due on that day, regardless if that date is **Closed** in your **Calendar Preference** *(see "Calendar Preferences" on page 73)*.

Step by Step:

To set an override date:

Step 1. First enter the desired mode.

Step 2. Then type "`.MMDDYY`" (or "`MM/DD/YYYY`" or "`M/D/YY`", etc.) and press `<enter>`.

To clear an override date:

Step 3. Type "`.`" and press `<enter>`.

Bookdrop Mode (B)

Command: `B {optional barcode}`

Using Bookdrop Mode— Use the bookdrop command to check in items for one or for many patrons. In **Bookdrop** mode, all the item barcodes you scan (or enter) are checked in. This allows you to check in a large number of books without worrying about patron barcodes. For example, this mode provides a quick way to check in the large number of books returned at the end of the day, week, month, or year.

While in **Bookdrop** mode, Textbook Tracker assumes you are only checking items in. If you type or scan a barcode for an item that is *not* checked out, an error message will appear in the transaction log. If you enter a patron barcode, Textbook Tracker switches to **Check Out** mode and makes this patron the current patron.

Step by Step:

To check in a single item:

Step 1. To check in one item, type "`B`" in the command line followed by the copy barcode number and press `<enter>`.

To check in multiple items:

Step 1. Enter **Bookdrop** mode by typing "`B`" and pressing `<enter>`, or choosing **Start Bookdrop (Ctrl/Cmnd+1)** from the **Actions** menu. You can also select **Bookdrop (B)** from the **Actions** menu next to the left of the command line.

Step 2. If different than today's date, set an override date for the date the copies were returned.

Step 3. Scan (or type) the barcodes of the copies to check in.

Step 4. Respond to any circulation alert messages that appear.

Step 5. When finished using the bookdrop or override date modes, clear them by typing "`.`" and pressing `<enter>`.

Additional Circulation Commands

Use these commands to locate patrons and items for which you don't know the barcode number. For example, if you want to check a book out to a patron, but you don't have that patron's barcode number, you can use the lookup command to find that patron by name.

When you enter a locate command, a **Lookup** window appears starting with the patron or item that is the closest match to the last name you specified or the title you entered. When you select a patron or item from the results list, they become the current patron or item and appear in the **Circulation** window.

Locate a Patron by Last Name (L)

Command: `L {patron last name}`

Locate a Patron by Last Name—Use this command to locate a patron by last name and make them the current patron. For example, to find a patron with the last name Smith, enter "`L SMITH`". You only need to input as much of the last name to get to the general area on the **Lookup** window (e.g. `Smi` for Smith). Use the two **More** arrow buttons to show you more selections prior *to* or *after* your search entry.

Step by Step:

To look up a student by name:

- Either select **Lookup** from the **Actions** menu or type "`L`" in the command line.
- Type the student's last name and press `<enter>` or **Go**.
- Highlight the correct name and then press `<enter>`, click **Select**, or double-click on the correct name from the results list.

Locate an Item by Title (T)

Command: `T {title}`

Find Item by Title—Use this command to search for a copy by title (or a portion of the title). For example, to locate a title beginning with *Foundation*, type "`T foundation`" and press `<enter>`. The **Lookup** window appears, starting with the title in your collection that most closely matches the information you supplied.

Step by Step:

To look up an item by title:

Step 1. Either select **Lookup** from the **Actions** menu or type "`T`" in the command line.

Step 2. Type the first part of the title and press `<enter>` or **Go**.

Step 3. Highlight the correct title and then press `<enter>`, click **Select**, or double-click on the correct title from the results list.

Placing a Hold Request on a Title (H)

Command: `H {item barcode}`

Placing a Hold Request—Use the "H" command to place a hold on an item for the current patron or to begin **Hold** mode.

To hold an item for the current patron, type "H" and then type (or scan) the item's barcode number and press <enter>.

If you do not know the item's barcode number, locate it using the **Lookup** "T" command.

To start **Hold** mode, type "H" and press <enter>. A hold request is placed on each item whose barcode number you type (or scan) while in **Hold** mode. To exit **Hold** mode, type (or scan) a new patron barcode number or use the "X" or "." command. A current patron is required.

- Holds are against a single item record. If one copy of that title is available, the hold becomes an in-stock hold waiting for the patron to pick up the item.
- If a hold is placed on a title that has available copies, the hold will be converted to an in-stock hold on a specific copy.
- In-stock holds are removed when the copy is checked out. Checking out a different copy of the same title does not remove the in-stock hold.

- SHORTCUT -

An equal sign "=" is used as a shortcut for the current item barcode. For example, if you have a current patron (and item), "H=" will place a hold on the current item.

Step by Step:

To place a hold:

Step 1. First, scan (or type) the student's barcode to make them the current patron.

Step 2. Next, use the **Lookup** command "T" and enter the name of the title.

Step 3. Select the correct title from the **Lookup** window by double-clicking on the name or by highlighting the correct title and pressing <enter> or clicking the **Select** button.

Step 4. Finally, type "H=" <enter> in the command line, followed by <enter>, to place a hold on the current title for the current patron.

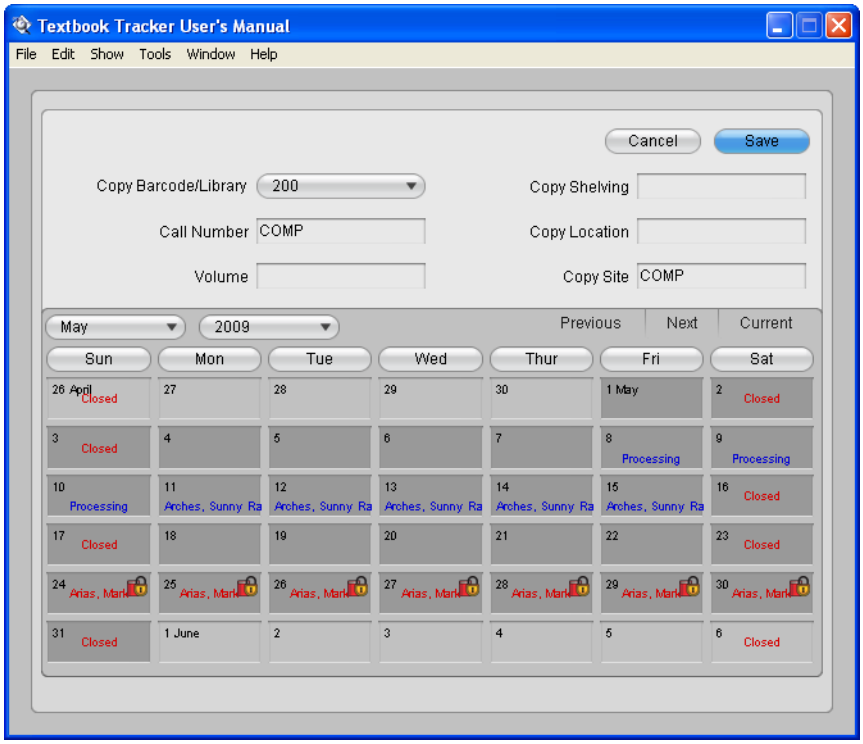
Place a Forward Reservation on a Specific Copy (G)

Command: `G {item barcode}`

Place a Reservation—Current patron places a reservation on an copy or activates **Reservation** mode.

- To place a reservation on an copy (if you have a current patron), type "G" and then type (or scan) the barcode of the copy; press <enter>. If you do not know the copy's barcode number, locate it using the **Lookup** "T" command *(see page 174 to review)*.

- To activate **Reservation** mode, type "G" and press <enter>. A reservation for the current patron is placed on every copy whose barcode you type (or scan) while in this mode. To exit **Reservation** mode, enter a new patron barcode number or use the "X" or "." command.
- When you enter the "G" command, Textbook Tracker opens a calendar for you to mark the days you want reservations placed on (for the current patron). The calendar will show the current month.



You *cannot* make reservations on days marked with the lock icon.

Here's how the reservation calendar will mark days:

- Days that the school is closed show the word **Closed** in red. The example on the previous page shows the school is closed on Saturdays and Sundays.
- Days that have existing reservations are marked with a locked book icon. The barcode number or name of the patron who has an copy reserved for that day that will be shown in red. Copies that are checked out or have in-stock holds placed on them are also shown in red. New reservations will be shown as blue.
- You may select different months or days or select another copy of the title (if available) from the drop-down menu in the upper left-hand side of the calendar.
- If the copy you are trying to place a reservation on is currently overdue, it will be shown as red in the middle of the calendar day and prefaced with an asterisk. Only days after a copy is due back will be marked as overdue.

NOTE:
Make sure the reservation dates are correct before you save. They cannot be changed later. To change dates, you must delete the incorrect reservation and place a correct one.

To make a reservation for the current patron, click on the day (or click and drag across multiple days) for which you'd like to reserve the copy. Days you select will be marked with the patron's barcode number or name in blue. To omit a day you have mistakenly selected, click on it again.

You can select any available days as long as you don't exceed the number of days allowed in your policies for patron and item. If preferences allow, you can select closed days to start and end reservations on.

When you have selected your reservation days, click **Save**. You can make more than one reservation on the calendar for single or multiple copies.

Use the **Cancel** button if you want to exit the window without placing a reservation.

To print reports for copies with reservations, select the **Circulation** tab from the **Reports** menu and choose the **Reservations** subtab. Using the **Edit / Selection** options for the **Reservations** report, you can specify which reservations to print.

- NOTE -

Reservations are against specific copies for specific days. Only the patron who placed the reservation can check out that copy during the time of the reservation.

Step by Step:

To create a forward reservation:

Step 1. First scan (or type) the patron's barcode to make them the current patron.

Step 2. Next type "G" and type (or scan) the barcode of the copy on which to place the reservation.

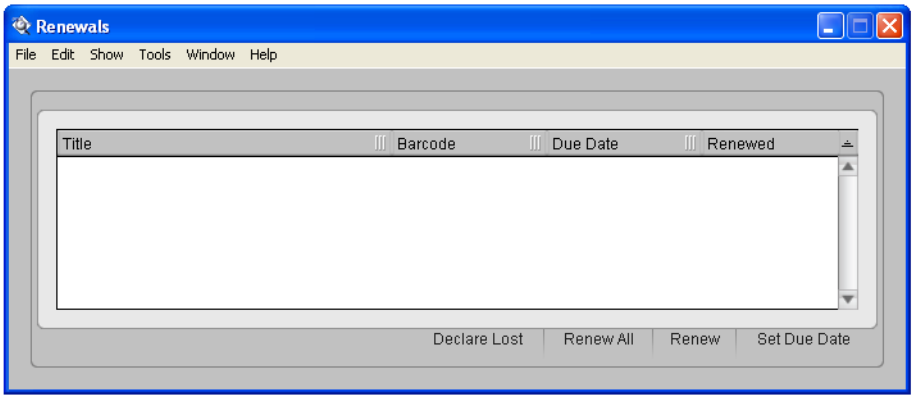
Step 3. Select (highlight) on the dates for the patron's reservation of that copy.

Step 4. Click **Save** when finished.

Renewing An Item (R, QE, or RA)

Command: `QE`

Renewing an Item—Displays a list of all the books checked out to the current patron, allowing you to choose which books to renew or declare lost (both are also menu options).



- N O T E -

Although you can use the `QE` command, it's functionality has been usurped by the **Renewals** subtab of the main **Circulation** window; this is discussed in more depth on the "*Circulation tabs*" section of the Textbook Tracker Online Wiki.

The ***Renew All** button will fail to renew items that have holds placed on them if your policy preferences indicate that renewing items with holds is disallowed. If you want the override this and renew them all anyway, highlight all of the items by clicking on the first item in the list while holding down the `<shift>` key and then proceed to click on the last item in the list. Then, click the **Renew** button. The renew option will generate any override dialogues as appropriate and allow authorized users to override them as desired.

***Renew All—**Renews all of the current patron's items.

Declare Lost—The selected (highlighted) items will be assigned to the **Lost Copies System Patron**. All items you have selected will be then registered as lost.

Renew—Renews one item at a time; also renews a range of selected (highlighted) items.

Renewing an Item

Command: `R {item barcode}`

Renewing an Item—Use this command to renew an item or activate **Renew** mode. You can specify the number of times an item can be renewed in your **Policies** *(see "Policy Preferences" on page 75)*.

To renew an item:

- If the item is present, type "R" and scan (or type) the barcode number for the copy and press <enter>. If your **Policies** allow, this item is renewed to the patron who has it checked out. That patron also becomes the current patron.
- If you do *not* know the item barcode (or the item is not present), enter the patron's barcode number. Then, type **QE** <enter>. Select the title to be renewed and click on the **Renew** button. Alternately, you may click on the **Renewals** subtab of the main **Circulation** window's **Circulation** tab, highlight the item to renew from the list and click the **Renew** button.
- To start **Renew** mode, type "R" and press <enter>. All item barcodes you scan (or type) while in this mode are renewed. To exit **Renew** mode, enter a patron barcode number or use the "X" or "." command.

If renewal is not allowed, a message will appear to inform you. A renewal is not allowed when the **Policy** is set to refuse renewals or when renewing an item would take it into a reserved date range.

Renew All Items

Command: `RA`

Renewing an Item—When you have a current patron, this command renews all the items checked out to that patron. The **Renew All** command is different from the **Renew** command in that it overrides *every* policy restriction *except* for a renewal with holds on the item.

Step by Step:

In review, to renew all items:

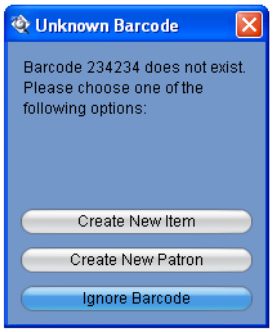
- If you do *not* know the item barcode (or the item is not present), enter the patron's barcode number. Then, type **QE** <enter>. Select the titles to be renewed or click on the **Renew All** button.
- Alternately, you may click on the **Renewals** subtab of the main **Circulation** window's **Circulation** tab, highlight the items to renewed from the list and click the **Renew All** button.
- Or, if the items are not present and the patron wishes to renew all the titles, type RA into the command line of the main **Circulation** window followed by the patron's barcode number and press <enter>. This will automatically renew all items checked out to that patron.

Adding Items "On the Fly"

To add an item "on the fly":

Step 1. Type (or scan) the patron's barcode number.

Step 2. Place a barcode label on the item and type (or scan) the number. The following window will appear:


Unknown Barcode
Barcode 234234 does not exist. Please choose one of the following options:
Create New Item
Create New Patron
Ignore Barcode

Step 3. Click on **Create New Item**. Depending on your preferences *(see "Management tab" on page 94)* and/or license privileges, either a blank **Items** management window or the **Add Title Assistant** window will appear.

Step 4. Fill in the fields you desire. **Barcode**, **Title** and **Policy** are the only fields that are required (in both the **Add Title Assistant** and the **Items** management window).

Step 5. Click the **Save** button in the upper-right corner of the **Items** management window.

Special Circulation Commands

Charging a Fee (F)

Command: `F`

Fee Charges and Payments—To view charges and payments or refunds and credits for the current patron, type "`F`" in the command line and press `<enter>`, or choose **Make Charges/Payments (Cmnd/Ctrl+2)** from the **Actions** menu. These commands will open the **Charges** tab of the main **Circulation** window.

> **- NOTE-**
>
> To charge a patron for a damaged book after it has been checked in, use the "`F {book amount} {description}`" command in **Circulation** window with a current patron. For example, if patron `1621` bookdropped a damaged item, an operator can later enter patron `1621` into the **Circulation** window and assess them a $20.00 fee by typing "`F 20.00 Charles scribbled in index`" into the command line.

Command: `F {charge amount} {comment}`

Charging a Fee—Use the "`F`" command followed by a dollar amount and optional comment to issue a charge against the current patron. For example, to charge a $4.50 fee for the school Reading Club membership, type "`F 4.50 Reading Club`" and press `<enter>`.

Step by Step:

To charge a fee:

Step 1. Make the patron current by typing or scanning the patron's barcode (or by using the **Patron Lookup** "`L`" command to find the patron by last name).

Step 2. Next type the **Fee (F)** command, followed by the fee amount, and the description of the fee. Press `<enter>` when the description is as desired. (e.g. `F $3.00 Water damage on item 3027`.)

Step 3. Once you enter a charge, you can edit it if you made a mistake. In the **Charges** mode (and tab) of the **Circulation** window, select (highlight) the charge from the list and click on the **Edit Charges** button. You can modify either the **Fee Comment** or the **Fee Amount** (except on overdue fees which are still accruing).

Declaring a Copy Lost

Use the **Lost Copies** special patron to flag copies for later removal. Use this feature at the end of the year when you must account for how many copies were lost and their accumulated worth.

When an item that is checked out to a patron is declared **Lost** (i.e. checked out to the **Lost Copies** patron), the **Lost Book Charge** window appears, allowing you to fine the patron who has lost the item.

Step by Step:

To declare an item lost:

Step 1. While in **Check In/Out (.)** mode, type **1** in the command line and press <enter>.

Step 2. The **Lost Copies** patron will appear as the current patron.

Step 3. Type the barcode of the copy that was lost. Remember to press <enter> after each barcode.

Step 4. When a copy has been lost by a specific patron, you don't need to check the item in first—just check it out to the **Lost Copies**.

When an item that is checked out to a patron is declared **Lost**, the **Lost Book Charge** window will appear.

Step by Step:

Use the following steps to charge a **Lost Item** fee:

Step 1. The **Total Patron Fines Due** is pulled from the item copy **Replacement Cost** field or your **Default Replacement/Purchase Value** policy field. You may enter any additional charges or processing fees in the **Additional Charge** field.

Step 2. If applicable, enter an amount of the accrued fine or lost book charge to be forgiven in the **Forgiven Amount** field.

Step 3. If the current patron has a credit balance on their account, you may choose to make a payment against the charge **From Credit**. If credit is available, the **From Credit** field becomes modifiable and their current credit balance is shown between the parentheses.

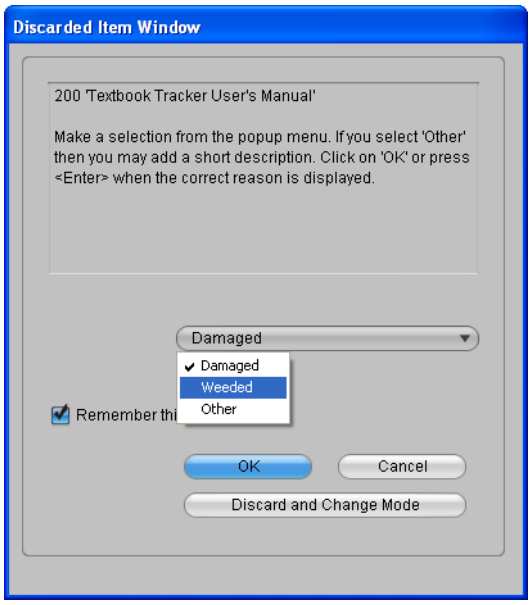
Step 4. If you supply a **Payment** amount, the **Payment Method** drop-down menu becomes selectable; you may then choose from **Cash**, **Check**, **Charge**, or **Other**.

When you are satisfied with the fee you have charged, click the **Charge Fine** or **Charge Fine and Print Receipt** buttons to charge the fee and print an optional receipt. These receipts can either be given to the patron at time of charge or filed by the school for safekeeping. If you would like to forgive the current charge (plus any additional amounts) minus the amount of payment, click **Forgive Fine**.

Checking Items Out To the Discarded Copies Special Patron

Use the **Discarded Copies** special patron to flag copies for later removal. Use this feature at the end of the year when you must account for how many copies were discarded and their accumulated worth.

When checking an item out to the **Discarded Copies** patron (barcode 2) you are allowed to indicate the reason for the item's disposal.


Discarded Item Window
200 'Textbook Tracker User's Manual'
Make a selection from the popup menu. If you select 'Other' then you may add a short description. Click on 'OK' or press <Enter> when the correct reason is displayed.
Damaged
Damaged
Weeded
Other
Remember thi
OK
Cancel
Discard and Change Mode

You may choose three different options from the drop-down menu of the **Discarded Item Window**. Click **OK** or press `<enter>` when the correct reason for item's disposal is selected.

Damaged—If the damaged item *is not* checked out to a patron, you may check it out to the **Discarded Items** patron (Special Patron #2) with the **Reason** as **Damaged**. Nothing will happen to the item other than it is marked as "`Discarded-Damaged`". This is similar to declaring an item, that was not checked out to a patron, as lost.

However, if the damaged item *is* checked out to a patron and is then checked out to the **Discarded Copies** patron without being checked in first, then the **Discarded Items Window** will change and display the item's **Replacement Cost**, allowing you to charge a fine to the patron who last borrowed the book (and presumably damaged it). Clicking on **Charge Fine and Print Receipt** or **Charge Fine** will charge a fine to the offending patron and place a note in the transaction log. However, you may also choose **Forgive Fine** if you do not wish to charge the offending patron for the replacement cost.

Weeded—If your school is removing a certain book (or series of books), this option will check books out to the **Discarded Copies** special patron and apply the disposal reason as "weeded".

Other—Selecting this option allows you to add a short piece of descriptive text that specifies the reason for the item's removal. These reasons for removal will be displayed when you perform the **Discarded Copies** report. Entering a definitive reason such as "outdated," "worn out", or "no longer used", allows you to print a **Reordering Details** report which will assist in reordering items that have been discarded and need to be replaced.

Step by Step:

To declare an item discarded:

Step 1. While in **Check In/Out (.)** mode, type **2** in the command line and press <enter>.

Step 2. The **Discarded Copies** patron will become the current patron.

Step 3. Scan (or type) the barcode of the copy to be discarded. Remember to press <enter> after each barcode if you are typing the barcode.

Step by Step:

To permanently remove all **Lost** or **Discarded** copies, use the **Copies Utilities** to permanently remove lost and discarded items after you have run the necessary reports.

Step 1. Select **Utilities** from the main **Tools** menu.

Step 2. Click on the main **Copies** category tab and **Utilities** subtab.

Step 3. Choose to perform either the **Remove Lost Copies** or **Remove Discarded Copies** utility.

Step 4. If you wish, limit which copies to remove using the **Select By** drop-down menu options under the **Selection** tab of the **Edit Utilities** window.

Step 5. Click the **Run** button to perform the utility.

- NOTE-

As with *every* utility, run an **Archive** or make a backup copy of your **Data** file prior to running the utility to remove all discarded or lost items.

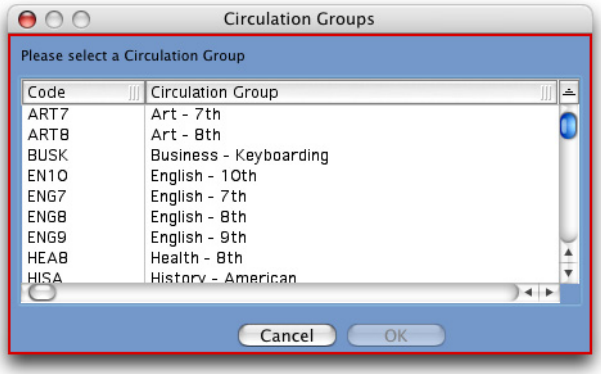
Apply Circulation Group

Command: CG

Set Circulation Group—Use the "CG" command to check items out to patrons under a designated **Circulation Group** code. The "CG" mode requires that you have a **Current Patron** and **Item**. After selecting a **Circulation Group**, a small, white box with the **CG** code will appear to the right of the **Circulation** window's command line.

The selected **Circulation Group** code will be applied to any items that you check out.

The only way to clear this particular mode is to re-enter "CG" into the command line and press enter.



Change Circulation Group

Command: CN

Change Circulation Group—Use the "CN" command to apply **Circulation Groups** to items that have already been checked out. Entering "CN" in the command line puts Textbook Tracker into the **Change Circulation Group** mode. After selecting a **Circulation Group**, a small box with the **CN** code will appear to the left of the **Circulation** window's command line.

Enter the barcode number of the item whose **Circulation Group** you would like to change. The item will be immediately updated with the new **Circulation Group** code.

Entering a patron barcode number to switching to another mode will terminate the **Change Circulation Group** mode. You may also terminate this mod using the "X" or the ". ." commands.

Notes:

Item Management

This section provides a brief overview on how to manage the resources in your collection.

> **- NOTE -**
>
> If you are using a Central Union license for Textbook Tracker, all schools share title information, thus, all other sites can view the changes you make.
>
> The Textbook Tracker Workstation allows you to view and edit titles from every collection in your district, but only *your* title statistics and copy information may be modified from your Workstation.
>
> The Central Administrator Workstation allows viewing and editing of all database information across all collections.

About MARC records

All Textbook Tracker item data is saved in MARC[1] (**MA**chine-**R**eadable **C**ataloging) record format, the standard for bibliographic data around the world. If you don't know MARC standards, Textbook Tracker has an easy entry editor that lets you view and edit MARC data without *any* technical MARC knowledge.

For those who are familiar with MARC standards, our powerful **MARC View** editor is available for correcting your data. You can switch between the two editors using an **Actions** menu selection or the `<Cmnd/Ctrl+Shift+M>` keystroke.

Although it's hidden from you, Textbook Tracker saves additional information in the MARC record for library automation duties. This information is Textbook Tracker-specific and is not included in the MARC editor. However, if you export data to transfer into another Textbook Tracker Data Station or COMPanion application, the export functions *will* include this Textbook Tracker-specific information.

The MARC standard is complex and ever-changing. Thus, there may be information in your MARC records that is valid MARC data, but unused by Textbook Tracker. It may be that newer versions of Textbook Tracker will use this data, so it's carefully saved with the rest of the MARC data. If you have MARC information that you'd like Textbook Tracker to process, send a written request to:

```
Textbook Tracker MARC Suggestions
COMPanion Corporation
1831 Fort Union Boulevard
Salt Lake City, Utah 84121
```

Or, send an email to: "`ideas@companioncorp.com`"
Your request will be examined and you'll receive a response.

1.To learn more about MARC tags and subfields, visit the Library of Congress' website: `http://www.loc.gov/marc/`

Items Management Window

To open the **Items** management window, select **Items (Cmnd/Ctrl+I)** from the main **Show** menu.

The **Items** management window contains information about all the items in your database. All items that circulate (books, magazines, audio video media, etc.) are accessible through the **Items** management window.

The term "item" can also mean "title", "issue", or "copy" depending on the context. An item can be a book, video, filmstrip, newspaper, or any other form of media in your collection and each title can have multiple copies.

- **Title Information** consists of data that is identical for all copies of a particular item, including author, publication, and notes.
- **Copy Information** consists of data that is specific to a given copy.

Textbook Tracker creates, stores, and updates MARC records with the information you enter into the **Items** management window, which allows you to manage the item information for your collection.

If you are using a Central Union license for Textbook Tracker, all sites share title information, thus, all other schools can view the changes you make.

- The Workstation allows you to view and edit titles from every collection in your district, but only your title statistics and copy information may be modified from your Workstation.
- The Central Administrator Workstation allows viewing and editing of all database information across all collections.

If there is an item current in the current item section of the Circulation window when the **Items** management window is launched, this will be the default record that is displayed in **Items** management window.

If there is no item current in the current item section of the **Circulation** window when the **Items** management window is opened, the default selection will be the last fifty modified titles. If your database contains *no* item records, COMPanion will always offer a sample record—the *Textbook Tracker User's Manual*.

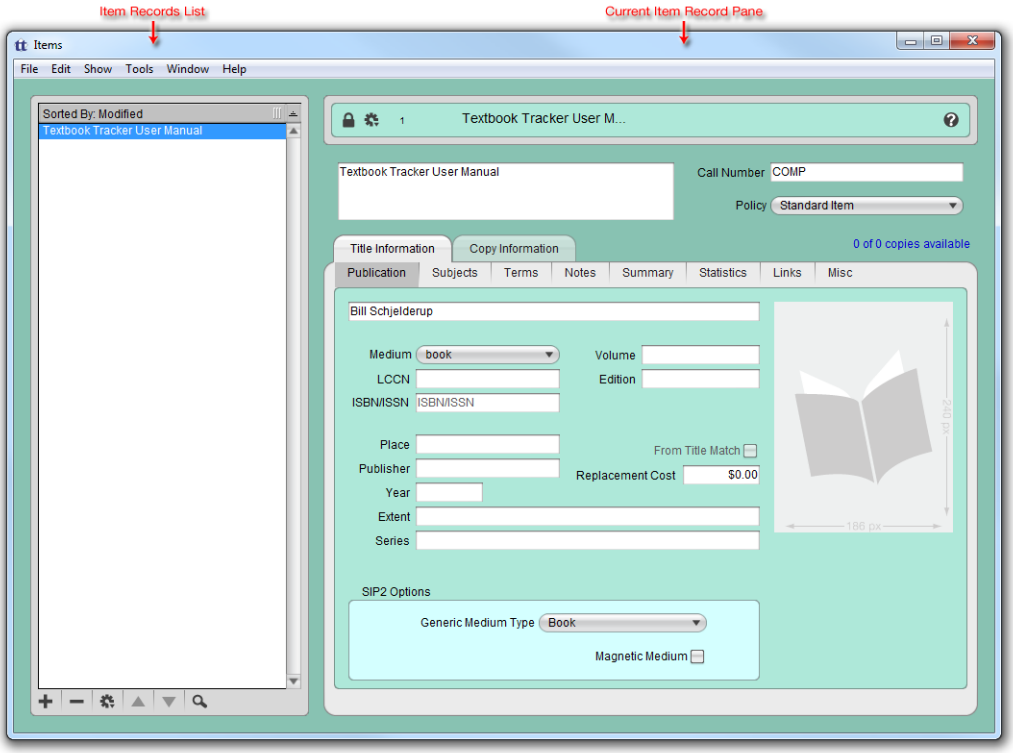
If the **Items** management window is launched while the <Alt>/<Option>-key is depressed, the default selection will be the last fifty titles added to Textbook Tracker, ordered by **Sequence Number**; also, a **Sort By Copy Sequence #** selection will be available in the **Item Selection Window** (in both **Simple** and **Advanced Title/Copy**).

The Items Management Window In More Detail

The **Items** management window consists of two distinct areas:

The left-hand side of the **Items** management window belongs to the **Item Records List** and related tools.

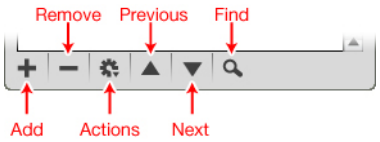
The larger, right-hand portion of the **Items** management window consists of the 'current item record pane' where the selected item record is displayed, in full, along with associated tools that help perform operations on said record.



Item Records List and Associated Tools

The left-hand section of the **Items** management window contains the **Item Records List** pane, where all item records matching an operator's **Find** `<Ctrl+F>` selection criteria will be displayed in the user-specified **Sort By** order in the **Item Selection** window. Highlighting/selecting an entry in the **Item Records List** will make that item record current in the right-hand section of the **Items** management window.

The area situated below the record list field contains several **Tools** icons that are used for adding, removing, browsing, and finding item records.



Current Item Record Pane

The right-hand section of the **Items** management window is dedicated to the current item record, which displays full record details for the record selected from the items list on the left.

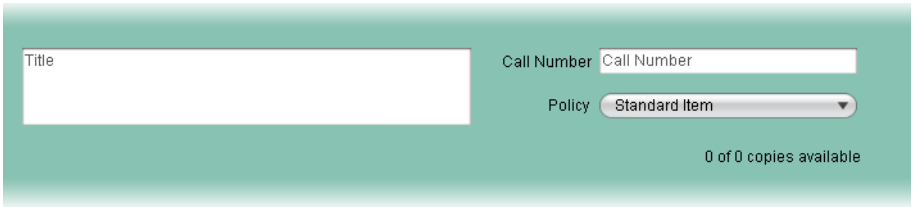
At the top of the current item record pane is a for displaying status information, **Save** and **Revert**, the **Wiki Help** icon, the **Lock/Unlock** icon and a second **Actions** menu which contains functions specific/unique to the current record.

Unlock/Lock Icon—When the **Items** management window is opened, the default state of the lock icon is usually "locked". When locked, records can be viewed but can not be edited. Clicking on the lock unlocks the window; it stays unlocked until the operator clicks on the lock icon again or the window is closed.

Actions—This gear/cog menu contains record-specific actions and other tools that don't fit as well with the **Add**, **Remove**, and **Find** functions offered in the **Records List Actions** menu.

Wiki Help—This button opens your default web browser to the **Items** management page of Textbook Tracker's on-line **Wiki Help**.

The very top of the **Current Item Record** pane contains the **Call Number**, **Policy**, and **Title** for each item record. This portion of the **Items** management window is always visible regardless if you have the **Title Information** or **Copy Information** tab selected.



The fields at the top of the **Items** window are as follows:

Title—A title is required; the record will not be saved unless a value is entered in the **Title** field. The title is saved under MARC field **245_a**.

In the **Title** field, if you enter a title that is longer than the line, the text wraps to the next line. To enter a subtitle, press <return> on the keyboard and enter a colon (":") followed by the subtitle. When you save the record, it is displayed with the colon and subtitle on the second line. This is saved under MARC field **245_a**. You can also use the equals sign ("=") in the **245_b** tag to designate a subtitle. However, the ("=") is mainly for multilingual titles.

For example:

If you want to continue manually entering or editing MARC information from the **Title** field, you can enter statements of responsibility and general material designation. Begin a statement of responsibility (**245_c**) with a front slash ("/") and enclose the medium in brackets ("[]"). All subfield information must begin on a new line in the **Title** field.

If you enter a medium, it will be saved (but not shown in the title field), only in the drop-down menu.

If you enter a statement of responsibility, and preferences are set to not show this, it will be saved, but not displayed.

If you enter title information and then <option-tab> (Macintosh) or <ctrl-tab> (Windows) out of the **Title** field (or if you have **Authority Control** enabled), an **Authority Control Title Search** window will appear, allowing you to see if this title is already in your collection. If it is, the **Authority Control** window will not display.

Stored within the **Actions** menu of the **Title** field is the **Non-Filing Characters** (**Indicator 2**) drop-down menu with the digits 0-9. Use this drop-down menu to specify the number of characters in the title to ignore when indexing the title. Thus, the title *The Wizard of Oz* should have a "4" selected so the book is sorted (indexed) as "Wizard of Oz". The final character to ignore must be either a space or punctuation character. If this indicator is set incorrectly, Textbook Tracker will revert the **Non-Filing Characters** setting to zero rather than ignore a partial word.

Call Number—Each title is assigned a call number. The call number designates the location of an item in the collection. Because call numbers are site-specific rather than universal (such as LCCN and ISBN), you must enter call numbers that are specific to your collection. The title call number is saved in MARC field **900_a**.

Depending on their source, imported MARC records may or may not include a call number for your items. Textbook Tracker formats call numbers to remove control characters and double spaces, thus repairing incorrectly formatted numbers.

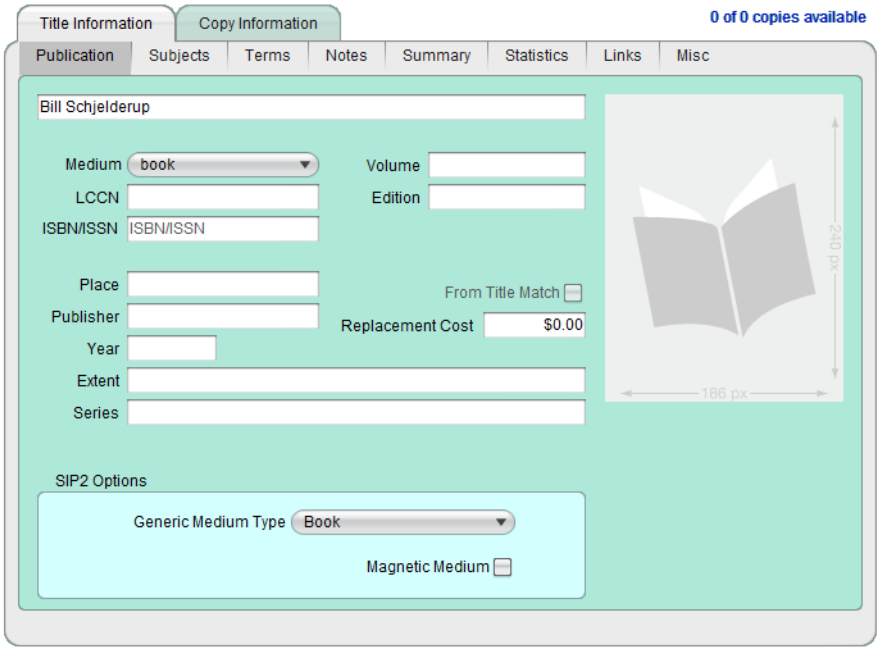
Copies "inherit" the title call number unless a specific copy call number is changed.

Policy—The title policy determines the circulation rules for a particular group of items. Every title is given a policy. In addition to enforcing circulation rules, an item's policy is used to group items for statistical analyses and reporting purposes.

Copies "inherit" the title policy unless a specific policy is assigned.

Current Record Tabs and Subtabs

The greater half of the current record pane consists of the **Title Information** and **Copy Information** tabs and relevant subtabs; these tabs contain the editable fields, drop-down menus, and checkboxes that are used to manage information related to the resources in your collection.



For more information, please review the "Title Information" and "Copy Information" tab sections of the Textbook Tracker Online Wiki.

Title Information—The **Title Information** tab and related subtabs contain pertinent information such each title record. Within these tabs and subtabs, you may view or edit information about each title.

Copy Information—The **Copy Information** tab and related subtabs contain information about each copy belonging to the title. Within these tabs and subtabs, you may view or edit additional information about each copy.

You cannot view or edit information in the **Copy Information** tabs until the primary **Title Information** is saved.

Adding Titles and Copies

Use the **New Record (Cmnd/Ctrl+N)** command, ("**+**") button, or corresponding selection from the from the **Actions** menu to add records to your Textbook Tracker database.

When you select this command, a fresh **Items** management window appears (depending on if you have the **Add Title Assistant** active)—prompting you for title information.

Type over the grayed-out (watermarked) data entry fields in the window (such as **Title**, **Author**, and so forth) to add a new record.

To move to the next blank data entry field, drop-down menu, or button, press the `<tab>` key. To move to the previous blank data entry field, drop-down menu or button, press `<shift-tab>`. To edit information in a particular data entry field, click in the corresponding field. To change a selection in a drop-down menu using only your keyboard, use the `<up>` and `<down>` arrow keys when the drop-down menu is outlined with a blue focus ring. When a button is outlined and you wish to perform that action, press the `<spacebar>`.

When you enter any type of specially-formatted information such as dates, phone numbers, or social security numbers, you can enter values in a wide range of formats. For example, you can enter the date of December 1, 2010 as: "`Dec 1, 2010`" or "`12/1/10`" or "`12.1.10`" or "`12 1 10`". If using the current year, you can just enter "`12/1`". If the current month is December, you can just enter "`1`"[1].

When you have entered all the information for this record, click the **Save** button in the upper right-hand side of the window. The record has now been saved. If you want to discard the information you have entered, click the **Revert** button and the previous record information will be restored.

If you try to select another record or leave the window without saving your changes, a warning message will appear, asking if you'd like to **Discard** or **Cancel**. If you click on **Cancel**, you'll return to the previous window with your newly-entered information still intact. Click the **Discard** button if you want to disregard the data you just entered. Otherwise, click the **Save** button to save your input.

The minimum of required fields for new titles are: **Title**, **Indicator 2**, **Medium** and **Policy**. Of these fields, all but **Title** are defaulted. Titles may be added with or without copies.

The only required field for new copies (i.e. a copy added to a title) is **Barcode**.

All defaults will be supplied by Textbook Tracker. These defaults may be changed.

Use the **Add Copy (Cmnd/Ctrl+Y)** command to open a fresh **Copy Information** tab in order to add new copies to the current title. Remember, copies are part of the title record and cannot be added until the main title record is saved.

When you have added all the necessary information for this copy, click the **Save** button in the upper-right corner of the window. Add any additional copies you desire and then click the **Save** button. If you want to discard the information you have entered, click the **Revert** button.

See the Textbook Tracker Online Wiki for more information on **Copy Information** tabs.

1.When you enter a two digit date, values between 0-30 are assumed to be 2000-2030 and values between 31-99 are assumed to be 2031-2099.

Step by Step:

To add a title record:

- Choose **Items (Cmnd/Ctrl+I)** from the **Show** drop-down menu.
- Choose **New Record (Cmnd/Ctrl+N)** from the **Actions** menu.
- Make sure to provide the appropriate **Title**, **Call Number**, and **Policy**.
- Provide the necessary information in the **Publication**, **Subjects**, **Categories**, **Notes**, **Summary**, and **SP** tabs.
- When all the appropriate fields have been filled in, click the **Save** button.

Step by Step:

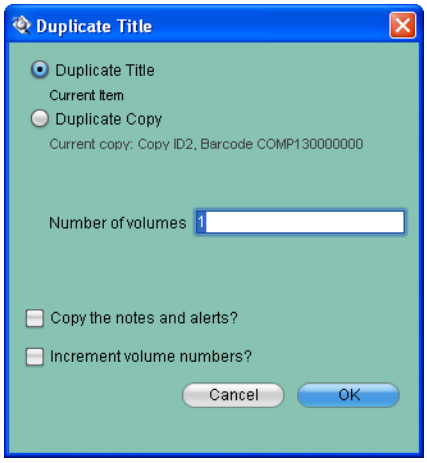
To add a copy:

- Locate the main title record for which a new copy should be added.
- Press the **Add Record** ("**+**") button or select `<Cmnd/Ctrl+N>` from the **Actions** menu.
- Provide the necessary information in the **Copy Info**, **Copy Notes**, or **Copy Status** tabs by tabbing between fields.
- When all the appropriate fields have been filled in, click **Save** in the upper-right corner of the main **Items** management window to save the copy.

Duplicating Titles or Copies

Use the **Duplicate (Cmnd/Ctrl+D)** command or selection from the **Actions** menu to make copies of existing titles. You can then modify information for the newly created title. This saves valuable data entry time when you are adding new items that have similar information (such as author, publisher and series).

After choosing to **Duplicate** the selected title, the **Duplicate Title/Copy** window appears.



Select whether you want to add a **Duplicate Title** or **Duplicate Copy**.

Duplicate Copy

Textbook Tracker automatically defaults the **Beginning barcode** number based on the value you entered in the **Next Barcode** field of the **Items System Preference** window. Choosing **Duplicate Copy** changes the **Number of volumes** field to **Number of copies**. Enter the number of additional copies you need for this title. You can type over this value to change it.

After you enter the **Number of Copies** you would like duplicated, click **OK**. A progress window appears to show the record is being duplicated.

If you chose to duplicate a copy, the **Items** management window appears with your newly-duplicated copy added. Replace necessary information in the duplicated fields of the **Copy Information** tabs to modify your new copy.

Duplicate Title

Type over the value in the **Number of volumes** field if the title you are duplicating has more than one volume. Each new title will be assigned a new volume number that will display on the screen. Type over the values that differ to create your new title.

After you enter the **Number of Copies** you would like duplicated, click **OK**. A progress window appears to show the record is being duplicated.

If you chose to duplicate the title, the **Items** management window appears with your newly-duplicated title. Replace necessary information in the duplicated fields of the **Title Information** tabs to modify your new title.

Be sure to provide all your duplicated fields with the correct information for your new title/copy. If you forget to modify a particular field, it will retain the information from the title/copy that was duplicated.

Step by Step:

To duplicate a title:

- Choose **Items (Cmnd/Ctrl+I)** from the main **Show** drop-down menu.
- Choose **Find (Cmnd/Ctrl+F)** from the **Edit** drop-down menu and locate the title using the **Item Selection** window.
- Click on the **Title Information** tab.
- Unlock the record, if necessary, by clicking on the **Lock** icon or choosing **Unlock (Cmnd/Ctrl+U)** from the **Actions** menu.
- Choose **Duplicate (Cmnd/Ctrl+D)** from the **Actions** menu.
- Mark the radio button next to **Duplicate Title**.
- Enter the **Number of volumes** to add.
- Then, click **OK**.

Step by Step:

To duplicate a copy:

- Choose **Items (Cmnd/Ctrl+I)** from the main **Show** drop-down menu.
- Choose **Find (Cmnd/Ctrl+F)** from the **Edit** drop-down menu and locate the copy using the **Item Selection** window.
- Locate the copy (by **Barcode**, **Copy ID**, or **Copy Call Number**) you wish to edit using the left and right arrow icons and **Browse Copies By** drop-down menu.
- Click on the **Copy Information** tab.
- Unlock the record, if necessary, by clicking on the **Lock** icon or choosing **Unlock (Cmnd/Ctrl+U)** from the **Actions** menu.
- Choose **Duplicate (Cmnd/Ctrl+D)** from the **Actions** menu.
- Click the radio button next to **Duplicate Copy**.
- Enter the **Beginning barcode** number and **Number of volumes** to add.
- Then, click **OK**.

Modifying Titles and Copies

NOTE:
Title changes must be saved before you can view or modify copy information.

You can edit record information directly on the **Items** management window or in any of the tabs contained within the window. For example, you can place your cursor in a field with an existing value and type additional information. You can also highlight the entire value and type over it. Before records can be changed, they must be unlocked using the **Unlock (Cmnd/Ctrl+U)** command.

> **- NOTE -**
>
> If your preferences are set to automatically lock records, you'll have to unlock the record by manually clicking on the "lock" icon from the upper left-hand side of the window or selecting **Unlock** (`Cmnd/Ctrl+D`) from the **Items** menu before you can make changes to the record.

To move to the next data entry field, press the `<tab>` key. To move to the previous data entry field, press `<shift-tab>`. To select a data entry field to edit, click in the same data field. To select from a drop-down menu, `<tab>` until the drop-down menu you desire is highlighted and use the `<up>` and `<down>` arrow keys to make your selection.

To modify copy information, click on the **Copy Information** tab or **Find (Cmnd/Ctrl+F)** the copy to modify.

When you have modified all the record information you want, click the **Save** button in the upper-right corner of the window. The record is now saved. If you want to ignore the information you have entered, click **Revert** to discard your changes.

If you try to select another record or leave the **Items** management window without saving your changes, the following warning message appears:

Message
The current record has not been saved. Do you wish to save it before viewing another record or window?
Cancel
Discard
Save

Click the **Cancel** button to return to the **Items** management window with your changes still intact. Click the **Discard** button if you want to ignore all of the information you've entered. Click the **Save** button or `<enter>` to save your changes.

Step by Step:

To modify title information:

- Choose **Items (Cmnd/Ctrl+I)** from the main **Show** drop-down menu.
- Select **Find (Cmnd/Ctrl+F)** from the **Edit** drop-down menu and locate the title using the **Item Selection** window.
- Click on the **Title Information** tab.
- Unlock the record, if necessary, by clicking on the **Lock** icon or choosing **Unlock (Cmnd/Ctrl+U)** from the **Actions** menu.
- Make any desired changes to the fields in the record, moving between **Publication**, **Subjects**, **Categories**, **Notes**, **Summary**, and **SP** tabs.
- When all the appropriate fields have been modified, click **Save** in the upper-right corner of the main **Items** management window to save the title record.

Step by Step:

To modify copy information:

- Choose **Items (Cmnd/Ctrl+I)** from the main **Show** drop-down menu.
- Select **Find (Cmnd/Ctrl+F)** from the **Edit** drop-down menu and locate the copy using the **Item Selection** window.
- Click on the **Copy Information** tab.
- Locate the copy (by **Barcode**, **Copy ID**, or **Copy Call Number**) you wish to edit using the left and right arrow icons and **Browse Copies By** drop-down menu.
- Unlock the record, if necessary, by clicking on the **Lock** icon or choosing **Unlock (Cmnd/Ctrl+U)** from the **Actions** menu.
- Make any desired changes to the fields in the record, moving between the **Copy Info**, **Copy Notes**, or **Copy Stats** tabs.
- When all the appropriate fields have been modified, click **Save** in the upper-right corner of the main **Items** management window to save your changes to the copy record.

Removing Titles and Copies

Items that have been discarded, given to other schools, sold, or permanently lost must be removed from the system to keep reports and searches from becoming cluttered with obsolete information. However, be certain that the items you are removing from Textbook Tracker have been permanently expunged from your collection.

For example, a lost item may eventually be found or returned. In this case, it is better to record those items as **Lost**, **Discarded**, **On Repair**, **On Order**, **Archived**, or **Unknown**. These special item categories allow you to keep track of items that may eventually return to your school *(see "Special/System Patrons" on page 165)*. COMPanion recommends that you only remove those items that *may* never return to your collection.

Use the **Remove Title** button ("**—**") or command `<Cmnd/Ctrl+Shift+R>` to permanently remove the selected/current title and all its copies.

The **Remove Copy** command is only available when there are copies belonging to the main title record. Selecting this option will remove the currently selected copy whether it is lost or available.

When a title is removed, all associated information is also removed. A title that has a copy checked out to a patron *can not* be removed. However, copies that are checked out to the **Lost**, **Discarded**, **On Repair**, **On Order**, **Archived**, or **Unknown** patrons *can* be removed. The **Remove Copy** command only removes the selected copy record.

> **¡ WARNING!**
>
> Removing items is permanent and cannot be undone. If you remove an item in error, you will have to re-enter the information or recover it from a backup copy of your data. If you need to report on items that are lost or discarded for the year, you should check those items out to the corresponding "special patron." Run all necessary reports (such as **Super Summary**) before removing these items. Once they are removed, they are unavailable for any future reports.

Step by Step:
To remove a title:

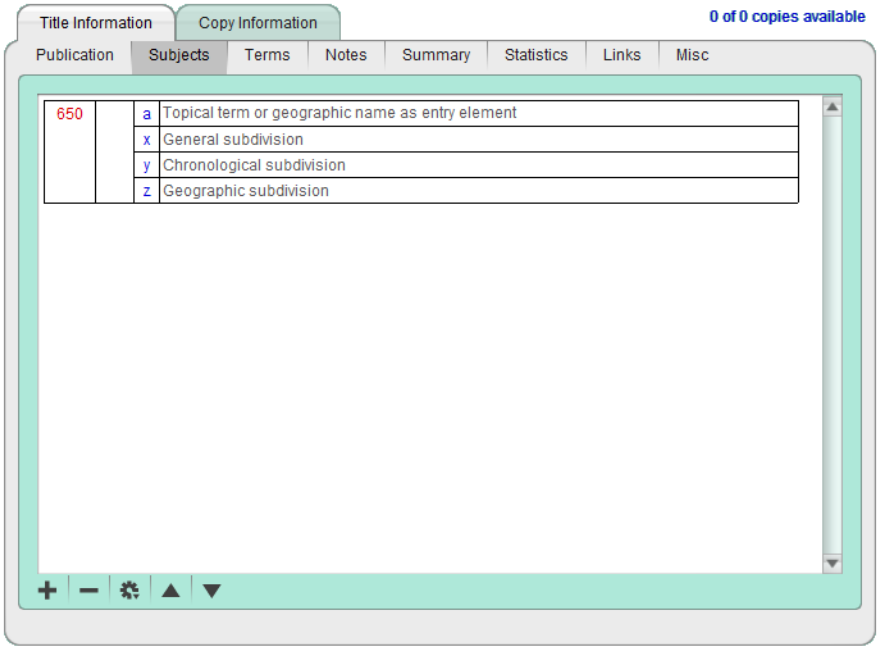
- Choose **Items (Cmnd/Ctrl+I)** from the main **Show** drop-down menu.
- Choose **Find (Cmnd/Ctrl+F)** from the **Edit** drop-down menu and locate the item using the **Item Selection** window.
- Use the **Remove Title** button ("**—**") or command `<Cmnd/Ctrl+R>`, or select **Remove Copy** from the **Actions** menu.
- A warning window will ask you to verify that you want the title permanently removed. Click the **Remove** button to permanently remove the title or the **Keep** button to ignore the request to remove the title.

Step by Step:
To remove a copy:

- Choose **Items (Cmnd/Ctrl+I)** from the main **Show** drop-down menu.
- Choose **Find (Cmnd/Ctrl+F)** from the **Edit** drop-down menu and locate the copy using the **Item Selection** window.
- Click on the **Copy Information** tab.
- Locate the copy (by **Barcode**, **Copy ID**, or **Copy Call Number**) you wish to edit using the left and right arrow icons and **Browse Copies By** drop-down menu.
- Select **Remove Copy** `<Cmnd/Ctrl+Shift+R>` from the **Actions** menu.
- A warning window will ask you to verify that you want the copy permanently removed. Click the **Remove** button to permanently remove the copy or the **Keep** button to ignore the request to remove the copy.
- Click **Save** in the upper-right corner of the main **Items** management window to save your changes to the copy record.

Title, Author, and Subject Editor

- The **Title** and **Author Editor** windows can be accessed from the **Actions** menus, located to the right of the respective entry fields. Using these editors, you can easily enter multiple, detailed subfields and new tags to any item.
- The **Title Editor** enables you to add uniform titles, etc.
- Use the **Author Editor** to add illustrators, editors, additional authors, translators, and more to the title record.
- The **Subject Editor** subtab in the **Title Information** tab provides an easy way of adding additional subject tags.

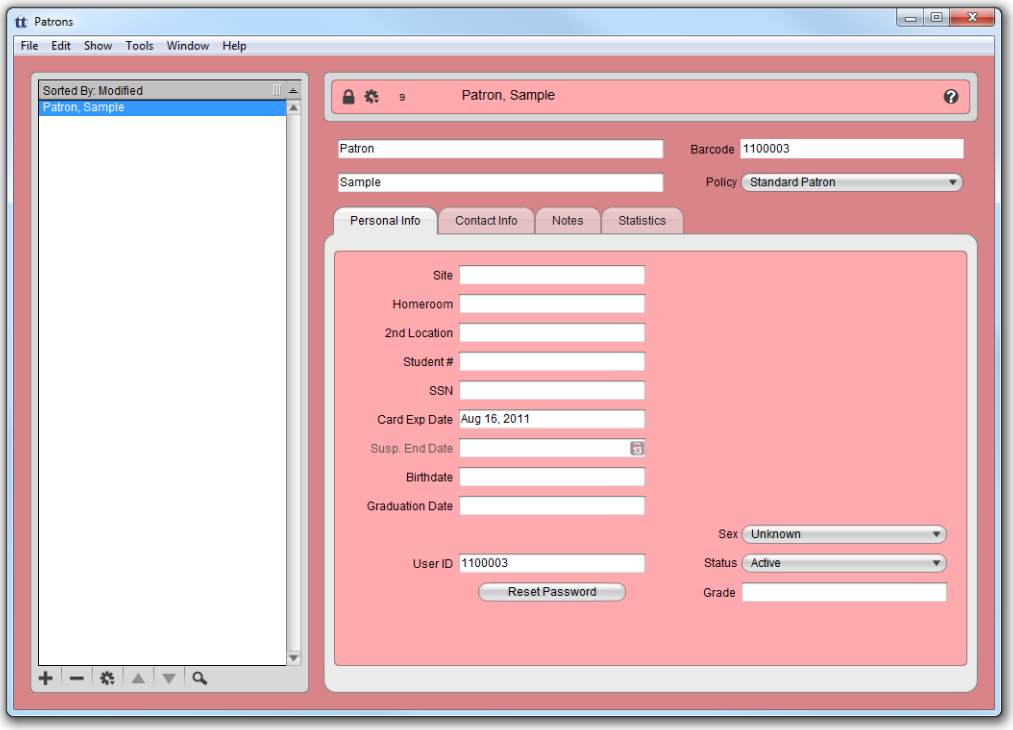


For more information on the **Title**, **Author**, or **Subject Editor**, please review the corresponding sections of the Textbook Tracker Online Wiki.

Notes:

Patron Management

The **Patrons** window contains information about the patrons in your school. To view the **Patrons** window, select **Patrons (Cmnd/Ctrl+L)** from the **Show** menu.



The top third of the window contains primary information about the current patron. This includes the patron **First** and **Last Name**, **Barcode**, and **Policy**.

More information about the patron is contained on the bottom-half of the window within associated tabs. Click on these tabs to reveal more patron information.

The patron you are presently viewing is called the *current patron*. Switching from the **Patrons** management window to the **Circulation** window will make that patron current in the **Circulation** management window. Likewise, if you have a patron current on the **Circulation** window and activate the **Patrons** window, that patron's record information will be displayed.

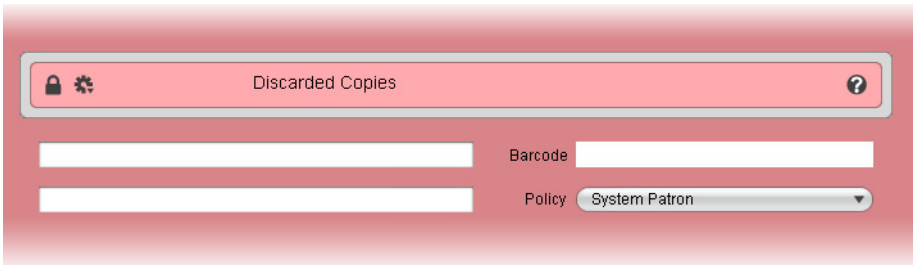
You can view, modify, add, and remove patron information using the **Patrons** management window and the commands in the **Actions** menu.

Patron Information Fields

The following section provides a brief overview for all the data fields in the **Patrons** management window. When a field has an obvious meaning or use (such as **City** or **Phone**), it will not be included in the explanation unless there are special circumstances about how it can be used.

Primary Patron Information

The top third of the **Patrons** window contains information about the current patron. This includes the patron name, barcode, and policy.



These are fields that cross the top of the **Patrons** window:

Patron First Name—Enter the patron's first name or the first name and middle initial.

Patron Last Name—Enter the patron's last name. This field is required, you *cannot* save a patron record without a last name.

Patron Barcode—Each patron will have a unique barcode number that is either assigned by Textbook Tracker or entered manually. This barcode can contain up to 15 digits and must be unique. It may contain numbers and/or letters, but no punctuation characters or spaces.

However, if you attempt to manually enter a patron barcode number that is less than *three* alpha-numeric characters, Textbook Tracker will display a warning message and disable the **Save** feature until the user has changed the barcode.

Patron Policy—The policy that you assign to a patron determines the rules to which this patron must adhere. To choose a policy for a patron, click the arrow at the end of the **Policy** drop-down menu and select a value. The default policy for new patrons is automatically assigned based upon the **Patrons** system preferences.

Current Record Tabs

The greater half of the current record pane consists of the **Patron** management tabs; these tabs contain the editable fields, drop-down menus, and checkboxes that are used to manage information related to the students in your school or district.

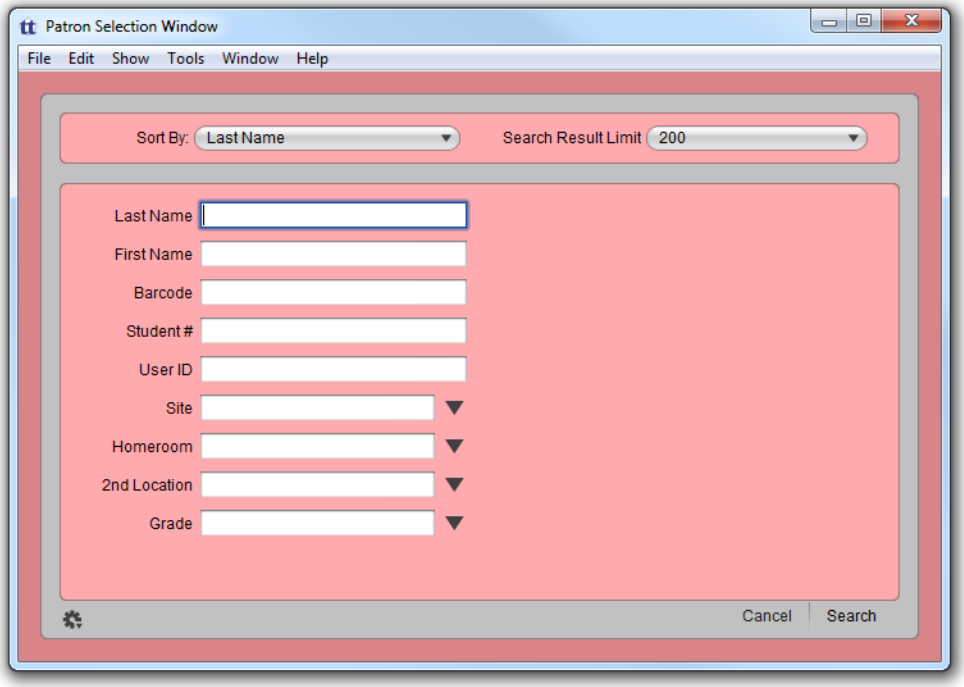
For more information, please review the "Patron Management" tab sections of the Textbook Tracker Online Wiki.

Finding Patrons

The **Find (Cmnd/Ctrl+F)** command under the **Actions** menu can be used to locate a specific patron. For example, if you are looking for a patron with the last name "`Anderson`," Textbook Tracker finds the first patron record with that name and selects it as the current patron in the **Patrons** window.

When you select the **Find (Cmnd/Ctrl+F)** command, the **Patron Selection** window appears.

Change the selection in the **Sort By** drop-down menu to choose to search other fields. Click the arrows at the end of fields to choose to search for a patron that starts with (or exactly matches) the information you enter. If no record can be located, Textbook Tracker will display an alert and the current record will not be changed.



The **Sort By** drop-down menu allows you to select *what* data to search for.

Click the **Search** button to locate the record or click the **Cancel** button to stop the **Search** operation and return to the most recent patron record. If a **Search** is performed, the **Sort By** selection in the **Patron Record Pane** of the **Patrons** window is automatically set to the same selection as the **Sort By** drop-down menu of the **Patron Selection** window.

Adding Patrons

Use the **New Record (Cmnd/Ctrl+N)** command, ("**+**") button, or corresponding selection from the **Actions** menu to add a new patron to your Textbook Tracker database. When you perform the **New Record** command, the **Patrons** management window will appear with blank fields where you will need to provide information.

Fill in all the necessary fields, drop-down menus, and checkboxes in each of the **Patrons** management tabs (such as first and last name, address, and so forth) to add a new record. Textbook Tracker will automatically copy the **City**, **State**, **Postal Code** and **Country** from your site address *(see "Site Information Preferences" on page 69)* for the new patron. You may type over these values to change them.

To move to the next blank data entry field, press the <tab> key. To move to the previous blank data entry field, press <shift-tab>. To select a particular data entry field to edit, click in the field. To select from a drop-down menu, <tab> until the drop-down menu you desire is highlighted and use the <up> and <down> arrow keys to make your selection.

The **Barcode**, **Last Name**, **Policy**, **Status**, and **Password** fields are all required in order to add a new patron. All these fields, except for **Password** and **Last Name**, will be defaulted[1]. Textbook Tracker automatically assigns a barcode number based on the value you've provided in the **Next Barcode** field in the **Patron System Preferences** window *(documented on page 105)*.

When you have added all the information you need for this patron, click the **Save** button in the upper-right corner of the **Patrons** management window. If you want to ignore the information you have entered, click the **Revert** button and the previous patron will be displayed.

You can add many patrons quickly if you have their data in electronic format.

Step by Step:

To add a patron record:

Step 1. From the main **Show (Cmnd/Ctrl+L)** drop-down menu, choose **Patrons**.

Step 2. From the **Actions** menu, choose **New Record (Cmnd/Ctrl+N)**.

Step 3. Tab from field to field as you enter the information about this patron.

Step 4. Use the drop-down menus to indicate policy, status, and gender for the patron.

Step 5. Click on the **Notes** tab to add any patron alert notes.

Step 6. Click the **Save** button.

1.The password default is the patron's last name.

Duplicate Patrons

Use the **Duplicate (Cmnd/Ctrl+D)** command to make a copy of an existing patron. You can then modify the duplicated information to create a new patron. This will save data entry time when you add patrons that have similar information such as location, graduation date, policy, and status.

When you select the **Duplicate (Cmnd/Ctrl+D)** command, the **Patrons** management window will appear with information copied from the last selected patron. Textbook Tracker will have automatically assigned the **Next Barcode** *(see "Patrons Preferences" on page 105)* rather than duplicating the barcode from the original record. Replace any information in the **Patrons** management window with information that is specific to the new patron.

Step by Step:

To duplicate a patron record:

Step 1. From the main **Show (Cmnd/Ctrl+L)** drop-down menu, choose **Patrons**.

Step 2. From the **Actions** menu, choose **Duplicate Record (Cmnd/Ctrl+D)**.

Step 3. Tab from field to field as you enter the information about this patron.

Step 4. Use the drop-down menus to indicate policy, status, and gender for the patron.

Step 5. Click on the **Notes** tab to add any patron alert notes.

Step 6. Click the **Save** button.

Modifying Patrons

You can edit information directly in the **Patrons** management window or in any of the tabs contained in the window. You can edit information in these windows the same as you would elsewhere in Textbook Tracker. For example, you can place your cursor in a field with an existing value and type additional values or you can highlight a value in a field and type over it. Before records can be changed, they must be unlocked by clicking on the **Lock** icon or by using the **Unlock (Cmnd/Ctrl+U)** command.

Step by Step:

To modify a patron record:

Step 1. From the **Show** drop-down menu choose **Patrons (Cmnd/Ctrl+L)**.

Step 2. From the **Edit** drop-down menu choose **Find (Cmnd/Ctrl+F)**.

Step 3. Using the **Patron Selection** window, type in the patron's name and press <enter>.

Step 4. Unlock the patron's record by clicking the **Lock** icon or by performing the **Unlock (Cmnd/Ctrl+U)** command.

Step 5. Click **Save** in the upper-right corner of the main **Patrons** management window to save your changes to the patron record.

Removing Patrons

There are times you may need to remove a patron from your system. Removing patrons who no longer use your site will help to ensure the accuracy of your reports.

> **¡ WARNING!**
>
> Before you remove a patron, backup your data files. Removing a patron is permanent and *cannot* be undone! If you erroneously remove a patron, you will have to re-enter all their information or recover the information from a backup copy of your data.

Use the **Remove** command to permanently remove the current patron.

When a record is removed, all associated information is also removed. For example, removing a patron also removes any holds or reservations that the patron has pending. A patron with items checked out *can not* be removed until all items have been returned to the school or recorded as **Lost**.

Step by Step:

To remove a patron record:

Step 1. From the **Show** drop-down menu choose **Patrons (Cmnd/Ctrl+L)**.

Step 2. From the **Edit** drop-down menu choose **Find (Cmnd/Ctrl+F)**.

Step 3. Using the **Patron Selection** window, type in the patron's name and press `<enter>`.

Step 4. From the **Actions** menu, choose **Remove Patron** `<Cmnd/Ctrl+R>` or click the **Remove** button ("**—**").

Step 5. Patrons *can not* be removed if they have items checked out.

Step 6. If a patron owes any fines or charges, you *can* still remove them, but their fines will be cleared from the system.

Patron Management Notes:

Shortcut Keys

Accelerator and Hotkey Commands

Hotkeys—Hotkeys are the underlined characters in a menu item or dialogue box that allow users to access the item or control by pressing that character's key on the keyboard. In the case of dialogue controls, the user may have to hold down the <alt> key before pressing the hotkey. Hotkeys are sometimes referred to as *shortcut* keys, *access* keys, or *mnemonic* keys.

Windows Shortcut Keys

Ctrl+Shift+N	New Document
Ctrl+O	Open
Ctrl+W	Close Window
Ctrl+Alt+W	Close All
Ctrl+S	Save
Ctrl+Shift+S	Save As Text
Ctrl+P	Print
Ctrl+Shift+E	Restart
Ctrl+Shift+E	Log Out
Ctrl+Q	Exit Textbook Tracker
Ctrl+Z	Undo
Ctrl+Shift+Z	Redo
Ctrl+X	Cut
Ctrl+C	Copy
Ctrl+V	Paste
Ctrl+A	Select All
Ctrl+F	Find
Ctrl+G	Find Again
Ctrl+;	System Preferences
Ctrl+Alt+;	User Preferences
Ctrl+T	Circulation
Ctrl+I	Items
Ctrl+L	Patrons

Windows Circulation Shortcut Commands

These shortcut commands allow you to quickly perform Circulation actions.

Ctrl+1	Start Bookdrop
Ctrl+2	Make Charges/Payments
Ctrl+3	Show Patron Details
Ctrl+4	Remove Patron Holds
Ctrl+5	Remove Patron Reservations
Ctrl+6	Show Item Details
Ctrl+7	Adjust Item Holds
Ctrl+8	Remove Copy Reservations
Ctrl+R	Renew Patron Items

Accelerator keys—An accelerator key is a keyboard shortcut that is accessed by holding down modifier keys (<shift>, <ctrl>, <alt>, or combinations of these) and pressing another key on the keyboard. Accelerator shortcuts appear to the right of a menu item text.

Macintosh Shortcut Keys

⌘+ H	Hide Textbook Tracker (Carbon)
⌥+ ⌘ +H	Hide Others (Carbon)
⇧+ ⌘ +N	New Document
⌘+O	Open
⌘+W	Close Window
⌥+ ⌘ +W	Close All
⌘+S	Save
⌥+ ⌘ +S	Save As Text
⌘+P	Print
⌥+ ⌘ +P	Print to PDF
⇧+ ⌘ +E	Restart
⌘+Q	Log Out/Quit Textbook Tracker
⌘+Z	Undo
⇧+ ⌘ +Z	Redo
⌘+X	Cut
⌘+C	Copy
⌘+V	Paste
⌘+A	Select All
⌘+F	Find
⌘+G	Find Again
⌘+;	System Preferences
⌘+T	Circulation
⌘+I	Items
⌘+L	Patrons

Macintosh Circulation Shortcut Commands

These shortcut commands allow you to quickly perform Circulation actions.

⌘+1	Start Bookdrop
⌘+2	Make Charges/Payments
⌘+3	Show Patron Details
⌘+4	Remove Patron Holds
⌘+5	Remove Patron Reservations
⌘+6	Show Item Details
⌘+7	Adjust Item Holds
⌘+8	Remove Copy Reservations
⌘+R	Renew Patron Items

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